inData

TrialDirector® 5

Trial Presentation Software

USER MANUAL

inData®

DISCOVER.
MANAGE.
PRESENT.
WIN.

Contents

Introduction 12
Introducing inData TrialDirector 12
What's New in TrialDirector? 12
TrialDirector v5.2 12
TrialDirector v5.1 14
TrialDirector v5 15
System Requirements 16
Other Ways to Buy TrialDirector 17
Converting an Evaluation Copy 17
Ordering Additional Copies 17
Don't forget our other fine products! 17
Ways to Increase Your Trial Presentation Skills 18
Contacting inData 19
Useful E-Mail Addresses 19
Technical Support 20
Getting Started with TrialDirector 21
Getting Started With TrialDirector 21
Other Resources 21
Navigating in TrialDirector 21
Creating and Organizing Your Case 24
Adding Items to the Case 27
Preparing for Trial 37
Working with Coding 37
Finding Testimony in Transcripts 40
Working with Issue Codes and Transcripts 43
Working with Video Clips 47
Organizing Exhibits Using Workbooks 51
Presenting at Trial 53
You're on your way… 58
Application Integration 61
Concordance 62
Topics 65
Export Coding Data From Concordance 65

iConect 70
LiveNote 77
CT Summation Enterprise/iBlaze Integration 83
Step One: Integration 84
Step Two: Exchanging Transcripts 85
Step Three: Linking Documents 88
Sending Images from CT Summation Products to TrialDirector 92
Sending Images to TrialDirector as a Result of a Search in Enterprise/iBlaze 92
Sending Marked (or Unmarked) Summaries to TrialDirector 94
Adding a Single Enterprise/iBlaze Document to TrialDirector 96
Presenting a Document Directly from CT Summation Enterprise/iBlaze 97
Creating Video Clips 99
Creating Clips based on Highlighting 99
Creating Clips from Transcript Notes 101
Playing Enterprise/iBlaze Transcript Text in TrialDirector 104
Creating Quick Exhibits from Enterprise/iBlaze Transcript Excerpts 105
Presenting Testimony Directly from Enterpise/iBlaze 107
Printing from Enterprise/iBlaze using TrialDirector's Printing Tools 110
Microsoft Access Integration 113
Establishing Link 113
Using Microsoft Access with TrialDirector 114
Configuring PowerPoint 114
Incorporating TrialDirector into PowerPoint 116
Case Library 123
The Case Library 123
Editing the Document Description (Properties) 125
Item is Not Located on Your Computer ("Mount the Volume..." Message) 128
Full Screen Item Viewer (Hide Case Explorer) 129
Create a New Workbook 131
Move Items into a Workbook 131
Sort Workbook Contents 132
Rearrange Workbook Contents 132
Rename a Workbook 132
Print Workbook Contents 133
Export Workbook Contents to a Script File 133
Export Workbook Contents to a Volume 134
Export Options: 136

Image Options: 137
Apply Current Label to Workbook Items 141
Remove a Workbook 142
Cases 142
Add a User 148
Edit User Information 149
Remove a User 149
Disable a User 149
Log Off a User 150
More Information: 150
Topics: 150
Add or Remove a Case Path 154
Backup a Case 157
Copy a Case 158
Pack a Case 160
Repair a Case 161
Restore a Database 161
Document Manager 167
Document and Exhibit Management Made Simple 167
Change the Window Split 168
Editing the Document Description (Properties) 169
General Settings 171
Images Settings 172
Media Clips 173
Native File Docs 173
Item is Not Located on Your Computer ("Mount the Volume..." Message) 174
Full Screen Item Viewer (Hide Case Explorer) 175
Use the Search Command 176
Use Clipboard Linking 177
Manually Import Items 180
Queue Items for Import 181
Add Pages to a Queued Document 183
Rename Queued Items 183
Remove Queued Items 183
Sort Queued Items 183
Import Queued Items into a Case 183
Create a Load File from Queued Items 184
Select a Scanner 189

Insert Document Break 191
The Selection Tool 199
Highlight an Image 199
Draw an Arrow 200
Draw a Line 200
Draw a Rectangle 201
Draw an Ellipse 201
Draw a Freehand Line 201
Set a Redaction 202
Add Text 202
Add a Sticky Note 204
Add Hot spot for one Click Scripts 205
Add a Label 205
Apply a Stamp 208
Deskew an Image 209
Copy Markups 209
Remove Markups 209
Save Markups 209
Create Layers 210
Create a Watermark 213
Set the Global Watermark 213
Attach Memos 215
Open Memos 215
Delete Memos 216
Load Memos from a Batch File 216
Re-Index Memos 217
Changing Pages 218
Copy an Image Area to the Clipboard 218
Create an Image Using the Quick Text Exhibit Creator 219
Annotate Images 220
Rotate Images 220
Enlarge Images 221
Pan Enlarged Images 221
Restore the Original Image Size 221
Magnify an Image Area in a Separate Window 221
The Multimedia Control Box 223
Play a Multimedia File 224
Pause a Multimedia File 224

Stop a Multimedia File....224
Change Playback Speed....224
Seek in a Multimedia File....225
Turn Audio On or Off....225
Create a Clip....225
Edit an Existing Clip....226
Methods To View Full Text OCR....231
Updating OCR Text....232
Navigating Through Full-Text for Multi-Image Documents....233
Add Full-Text Files....233
Set Printer Properties....237
Select Printer Output....237
Topics:....237
Images/Pages....237
Images/Pages (Thumbnails)....239
Images/Pages (List Report)....240
Barcode Sheets....240
Select Print Range....243
Standard Toolbar....246
Panning....249
Zooming....249
Transcript Manager....251
Synchronize the Contents....254
Show and Hide the Case Explorer....255
Segment Editor Tab....256
Search Tab....257
Standard Toolbar....259
Topics:....260
Multimedia Control Box....261
Segment Editor Mode....262
General Tab....264
Highlight Tab....265
Clip Tab....267
Tools Tab....270
Play a Digital Video Transcript....273
Pause a Digital Video Transcript....274
Stop a Digital Video Transcript....274

Change Playback Speed 274
Seek in a Digital Video Transcript 274
Move Around in a Digital Video Transcript 275
Clips and Segments 278
Create Clips From Issue Codes 286
Rename Clips 295
Change Clip Descriptions 295
Display Mode or Playback Mode Override 295
Copy Segments within Case Explorer 297
Copy Segments using the Segment Editor 298
Hide Segment Breaks in the Segment Editor 300
Add Segments to a Clip 300
Delete Segments in a Clip 301
Rearrange Segments in a Clip 301
Update Segment Start and End Times Using VCR Controls 303
Import a Transcript from a TrialDirector Case File 314
Import From Multiple Case Files 316
Import an ASCII Transcript 317
Import a Digital Video Transcript from inMotion DVT Media 324
Import Portable Transcript Format (PTF) Files 325
Search Using the Find Tool 328
Find Text/Phrase 328
Find Question/Answer 329
Find Page/Line 330
Find a Timecode 331
Other 331
Use the Find Next Command 332
Using Search Tab 332
Search Using Clipboard Linking 335
Clipboard Linking Commands 335
Copy Selected Text to the Clipboard 337
Select All Text 337
Play Selected Text 337
Add Selected Text to a Clip 337
Clear Selected Text 337
Export a Transcript to ASCII Format. 339

Export a Transcript to Portable Transcript Format (.PTF) 339
Attached and Synchronized Exhibits 340
Display Highlighting 347
Highlight Text or Change Font Color 347
Remove a Highlight or Font Color 348
Automatic Color Coding 348
Remove All Highlights 350
Creating Issue Codes 351
Assigning Issue Codes 352
Printing Issue Code Reports 353
Present Text Only 366
Present Video Only 366
Present Current Segment Only 367
Present Selected Text in Presentation Mode 367
Add an Application Short-Cut 368
Edit an Application Short-Cut 370
Remove an Application Short-Cut 370
Current Transcript 373
Current Transcript (Condensed) 375
Current Transcript (Word Index) 376
Issue Codes Report (Summary) 378
Issue Code(s) Report (Detailed) 379
Case Clip(s) Report (Summary) 380
Case Clip(s) Report (Detailed) 382
Coding 387
Coding Database 387
Column View 392
Browsing Full-Text OCR from Coding Tab 393
Add Full-Text OCR to Coding Database Record 394
Append Full-Text to Coding Database Record 396
Presentation 409
Effective Courtroom Presentation 409
Topics: 409
Options window 410
The Mouse Pointer 411
Presentation Window Indicators 412

Item Load Status Indicator....412
Replace Zone Indicator....412
Tandem Presentation Indicator....413
Toolbar Icon....413
Zone Activity Indicator....413
Change the Presentation Background....413
Close the Presentation Display....414
General Options....425
Tool Clearing....425
Default Zoom Tool....426
Screen Capture Format....426
Presentation Event Log....426
Display on Screen....427
Zones Settings....428
OLE Object Zone Windows....429
Zone Headers....429
Default Zone Mode....429
General....429
Images Settings....430
Image Display Control....430
Redaction Display....431
Snapshots....431
Multimedia/DVT Settings....431
Presentation Background....434
Tool Preferences....435
Zones....436
What do you want to do?....436
Zones 1 and 2....437
Zones 3 and 4....437
Zones 5, 6, 7, and 8....438
Zone 9....439
Topics:....439
Vertical Split -- Move Items Left to Right....440
Vertical Split -- Move Items Right to Left....442
Horizontal Split -- Move Items Top to Bottom....442
Horizontal Split -- Move Items Bottom to Top....444

Move Items Through the Quadrants 444
What do you want to do? 453
Switch Between Image/Native View (PDFs Only) 455
The Multimedia Control Box 459
Enable Closed Captioning 461
Advance Clip Segments 462
Customize Transcript Appearance 463
Change the Font 463
Change the Line Spacing 464
Manipulate 3D Objects 465
Preparing an Alternate Screen 467
Transferring the Preview to Active Display 468
Continuing with the Presentation 468
What do you want to do? 469
Load by Item ID 470
Load by URL 471
Load by Exhibit Number 471
Load by Trial Exhibit Number 471
Load by Macro 471
Create a Macro 471
Execute a Macro 472
The Default toolbar settings 473
Viewing and Selecting Workbooks 473
Next Workbook 473
Viewing and Selecting Items in a Workbook 474
Changing the Toolbar Settings 474
Loading Items onto the Presentation 475
Toolbar Zone Controls 475
Topics: 476
Standard Zoom 477
Zoom to Top 477
Zoom to Bottom 478
Rubber-band Zoom 479
Fill Zone Zoom 480
Area Projection Zoom 481
Topics: 481
Hide the Projection Lines 483

Animate Projection Zoom 483
Pan an Enlarged Item 484
Draw an Arrow 485
Highlight an Image 485
Draw a Line 486
Draw an Ellipse 486
Draw a Rectangle 486
Draw a Freehand Line 487
Change the Annotation Color 487
Overview 488
Applying Stamps to an Exhibit 488
Reposition Stamps 490
Removing Stamps 490
Overview 491
Applying Stickers to an Exhibit 491
Repositioning Stamps 493
Removing Stamps 493
Zone Controls 496
Main Controls 497
Annotation Tool Controls 502
Scripts 506
What do you want to do? 507
Export Workbook Contents to a Script File 507
Create a Script File Using a Text File Editor 507
Grab a Screen 511
Grab a Window 512
Overview of Projection Zoom Callouts 515
Callout Styles Available 516
Hide the Projection Lines 520
Animate Projection Zoom 521
Pan an Enlarged Item 522
Tools 523
FileBridge 523
ImageBrander 524
ImageSleuth 526
TimeCoder 527

Timecoding a Transcript....528
Editing Timecodes....530
Timecoding a Missed Line....531
Changing an Incorrect Timecode....531
To preserve the existing VideoNote™ timestamps during import,....537
Important Information About Transcript Timecodes....539
Preserving Transcript Timecodes During DVT Creation Process....540
Enable Q/C Mode....542
Q/C Mode Display....542
Navigate Between Missing Timecodes....542
Mark Missing Timecodes....543
Using Extrapolate Timecodes Function....544
Exporting Transcripts....545
About Synchronized Media Interchange Files....558
Exporting Digital Video Transcript to *.SMI File....558
Importing Transcripts....571
Appendices....597
Clip Creation Script File....597
Cross-Reference File....599
Load Files....599
Object Load List (.oll)....599
Generic Tiff Load File....601
Memo Batch File....602
Print List File....602
Document Entries....602
Page Range Entries....602
Problems List....603
Subset Case Batch File....603
Document Entries....603
Page Range Entries....604
Rename Items in a Subset Case....604
Enter a New Beginning Item ID in the Dialog Box....604
Enter a New Item ID in the Batch File....606
Assign Exhibit Numbers or Trial Exhibit Numbers to Items in a Subset Case....606

Introduction

Introducing inData TrialDirector

TrialDirector™ is inData's leading-edge trial presentation software. With TrialDirector, you can view, manage, search, and prepare case exhibits and depositions, and then orchestrate them into a compelling trial presentation. Indexing tools allow you to organize and annotate information by client, issue, witness, or any other logical criteria, then easily stage the information for presentation during trial. The Presentation mode enables you to blend drawings, photos, text, and videos with the ease of a Hollywood director, and lets you adjust, annotate, or amplify in the courtroom.

TrialDirector includes five principle modules:

- **Case Library** is a file management tool that allows you to view and organize your case materials.
- **Document Manager** is an exhibit management tool that helps you organize your case documents.
- **Transcript Manager**, a powerful video transcript editor, enables you to create synchronized text and multimedia clips.
- The **Coding** module allows you to create a database of all case documents.
- **Presentation** mode enables you to combine different types of evidence media – documents, transcripts, photos, video – on a single screen and display them in trial.

More Information:

1. What's New?
2. Getting Started with TrialDirector

- Manage Cases

What's New in TrialDirector?

TrialDirector v5.2

- **Advanced PDF Support** – You told us that PDF files are becoming a key component of your cases, and we responded with robust PDF support. With

TrialDirector® v5.2, you can instantly view, annotate, and redact PDF files (including those containing Chinese, Japanese, and Korean character sets) without Adobe Acrobat, Reader, or any special plug-ins installed on your computer. Working with a PDF is now as easy and seamless as working with any standard document in TrialDirector, perhaps even easier! In addition, TrialDirector v5.2 delivers maximum flexibility in customizing and printing PDFs. Instantly create a new PDF file out of selected documents or pages, print PDFs with or without annotations, and much more.

More Information

- **MPEG-2, MPEG-4, VOB, and QuickTime® Support** – Display crisper, clearer video depositions or other video footage for the jury at trial. In addition to the standard MPEG-1 format, TrialDirector now supports the higher resolution MPEG-2, MPEG-4, and VOB formats. It includes an MPEG-2 codec right out of the box, and a utility to convert DVD-Video to MPEG-2 program streams. More Information
- **Automatic Exhibit Numbers** – Quickly assign an exhibit number with a simple right click of the mouse. The easy-to-use wizard walks you through assigning exhibit numbers at either a document or page level. More Information
- **Customizable Presentation Toolbar** – Organize the Presentation Toolbar to work the way you do. In addition to choosing which buttons to view, you can now rearrange the order of the buttons and save your own customized toolbar. More Information
- **Mac® Support** - Good news for all of the Mac® lovers out there: TrialDirector Pro v5.2 has been tested and verified to work on Apple computers running the Microsoft Windows XP and Windows Vista® operating systems in the Boot Camp®, Parallels™, and VMware Fusion™ environments.
- **Full Screen Video/Exhibit Option** – This new option enables you to display an exhibit full-screen when it is referenced in a video deposition. The program will automatically fade back to the video testimony after the exhibit has been displayed in Presentation mode, or you can pause the video to allow extra time for the jury to read the exhibit. More Information
- **Play Up to Four Videos** – Need to show surveillance video from different angles or display a video deposition along side other recorded scenes? Take advantage of TrialDirector's ability to display up to four videos simultaneously in Presentation mode. More Information
- **Closed Caption Positioning** – With TrialDirector v5.2, you can decide where to display the associated transcript text when presenting a video deposition. Display closed captioning underneath the deponent's video or on top of the video to save screen space. More Information
- **Data Grid Viewer** – To sort your case data based on specific fields or to quickly edit item information, take advantage of the new Data Grid Viewer in TrialDirector. The grid offers a new way to view and manage your case documents, in addition to Case Explorer. Fans of the older TrialDirector v4.5 interface will love this new feature. More Information

- **Automatic Synchronization of Coded Data** – Now when you edit certain case data (such as the Trial Exhibit No.) from either the Case Library or the Coding tabs, the changes are made in both locations. More Information
- **Check for Updates** – Ensuring you have the latest updates to TrialDirector is even easier. Simply select Check for Updates from the Help menu and the program automatically checks for updates. If an update is available, the program walks you through simple installation. More Information

TrialDirector v5.1

- **Presentation Preview** – Now you can easily preview your exhibits and any corresponding annotations or treatments BEFORE showing them live in the Presentation Mode. It's like having a practice swing in the batter's box, before stepping up to the plate.
- **Designation Clip Creation** - TrialDirector already allows you to issue-code transcripts using case issues or designations. In Version 5.1, you can also automatically create video clips from any issue codes applied to your transcripts.
- **Vista™ Compatible** - Continuing our support of Microsoft technologies, TrialDirector 5.1 is fully compatible with the Windows Vista™ operating system.
- **Editing in the Case Explorer** - TrialDirector 5.1 now provides the ability to edit document information directly from the Case Explorer tree. Users can edit the document's Description, TrialExhibit Number, and Exhibit Number fields in a grid-like view, while still working in a case tree structure. We also added an "Expand All" button to speed up case tree navigation.
- **Product Integration** - TrialDirector now fully integrates with CT Summation® Enterprise, in addition to other third-party applications. The TimeCoder tool in TrialDirector also now allows users to create exhibit links to transcripts and export transcript files in multiple file formats, including a CT Summation Briefcase File (*.sbf).
- **Faster Document Loading for Large Collections** - Document Management has been enhanced, resulting in noticeably faster loading or transfer of large document collections.
- **Send to Workbooks** - A new, simpler right-click dialog allows you to quickly send your documents or pages to a selected Workbook, in addition to the standard drag-and-drop method.
- **Automatic Updates Notification** - An automatic updates dialog will now notify you when a new version of TrialDirector is available for download. (To allow for administrator control, this feature does not apply to network versions.)
- **Easy Conversion of Evaluation Software** - inData makes it easy to try TrialDirector before you buy it – just download an evaluation copy. If you like the product, you can easily convert the evaluation copy to a full working version from the Help menu within the program.

TrialDirector v5

- **New, Simplified Interface** – TrialDirector 5 features an all-new user interface using Windows-standard navigation, buttons, and menu styles.
- **Single Program Integration** – The DepositionDirector and DocumentDirector modules have been fully assimilated into TrialDirector 5. This allows TrialDirector users to work from a single application window to organize their entire case for trial.
- **Workbooks** – Folders are replaced by workbooks in TrialDirector 5. Workbooks allow you to build and organize trial notebooks, motion folders, and more with true hierarchical folder organization. Using the new Workbook Explorer and the simple color-coding tools, you can create sub-workbooks and color-code them separately from their parent, if desired.
- **Color Issue-Coding** – Color issue-coding is now available in transcripts. You tag key testimony with a color code, and coded transcript excerpts are automatically placed in the issue's folder. Identify all testimony excerpts assigned to an issue at a glance, or generate a report based on the color codes you've assigned.
- **Export Reports to Word, PDF, HTML or TXT** – Send transcript issue reports, video clip reports, or case detail summaries to directly to Microsoft Word®, Adobe® PDF, HTML, or TXT files, simplifying the process of submitting exhibit lists to the court.
- **Visual Editing of Video Clips** – TrialDirector 5's new waveform display shows where speaking begins, peaks, and ends. Using an easy drag-and-drop technique, you can fine-tune the clip to add or subtract as much leading or trailing silence as you want.
- **New Options for Video Clips** – Now you can send simple video clips to e-mail or your file system with a simple point-and-click interface. Or, send the clip and it's associated transcript to PowerPoint®.
- **Import OCR Text from Other Sources** – TrialDirector has always allowed fast searches for key words in OCR'd text. Now you can import and index OCR'd text from external programs as well, and search the results just like any other document within TrialDirector.
- **Easier Re-pathing When Moving Files** - Using the new Global Path Editor, you can reconnect files much more quickly when moving cases between office and trial computers, or just when sharing between users in-office.
- **UNC File Path Support–** TrialDirector 5 allows you to easily store and share files at central locations on your local network, simplifying case management, information sharing, and data security.

More Information:

3. Introducing TrialDirector
4. Using TrialDirector

- Managing Cases
- Presenting with TrialDirector
- Copyright Acknowledgements

System Requirements

Minimum Requirements

- Intel Pentium™ 4 Processor 2.4Ghz
- Windows 2000 (SP4), or a Mac® running Windows in a Boot Camp®, Parallels™, or VMware Fusion™ environment
- 512MB System RAM
- 32MB Display Graphics RAM
- 1024 X 768 Display Resolution at 16 bit (or better) color palette
- 32x (or better) CD-ROM Drive
- Sound Card and Speakers/headphones (Required for audio functions)

Recommended System

- Intel® Core™2 Duo Processor 2.33Ghz (or better)
- Windows XP or Vista™, or a Mac® running Windows in a Boot Camp®, Parallels™, or VMware Fusion™ environment
- 2GB System RAM
- 256MB Display Graphics RAM
- 1280 X 1024 Display Resolution at 32 bit color palette
- 8x DVD Recordable Drive
- Sound Card and Speakers/headphones (Required for audio functions)

More Information:

5. What's New?
6. Using TrialDirector

- Manage Cases

Other Ways to Buy TrialDirector

Can't get enough of TrialDirector? It's a common problem, and we have several solutions:

Converting an Evaluation Copy

Are you using an evaluation copy of TrialDirector? Click here for online purchase instructions.

Ordering Additional Copies

Maybe you already have a copy of TrialDirector and want to purchase additional copies. We have you covered!

- You can order additional copies on the Web at www.indatacorp.com.
- Would you rather talk to someone? Our friendly sales staff would be pleased to speak with you at **800-828-8292.**
- Do you need a lot of copies? For even greater savings, talk to the sales staff about our site license options!

Don't forget our other fine products!

If you like TrialDirector, you should consider our other litigation products and services. Our software products include:

- TimeCoder Pro™ - Video and Transcript Synchronization Software
- TimelineXpress - Timeline Charting Software
- DepoView™ - Video Review Software
- inVentory™ - eDiscovery Sizing Software

We also offer services including Data Analysis & Production, Trial Consulting & Preparation, and Encoding & Synchronization.

More Information:

- Contacting inData
- Converting an Evaluation Copy to Full License
- Installing and Activating

Ways to Increase Your Trial Presentation Skills

Congratulations! You've taken the first step to creating persuasive presentations by purchasing inData TrialDirector®, the leading trial presentation software. To help you use your software effectively, inData offers a variety of ways to improve or accelerate your trial presentation proficiency with this innovative tool.

FREE Online Tutorials

inData provides easy, interactive tutorials at no charge to TrialDirector customers. These pre-recorded tutorials are each 3-5 minutes in length and are available 24 hours a day, so you can learn at a time convenient to you. The tutorials detail common concepts for building a case with TrialDirector. Topics include:

- A Tour of the TrialDirector Interface
- Organizing with Workbooks
- Working in Presentation Mode
- Preparing Video Clips: Using the Segment Editor
- Creating and Assigning Issue Codes

Tutorials are available on inData's Web site at www.indatacorp.com > Resources > Support.

Training by inData Presentation Professionals

inData offers several training programs to increase your comfort level and quickly expand your presentation techniques using TrialDirector. Taught by inData's professional trial consultants, these training sessions are designed for hands-on participation.

You can attend training at inData's mock courtroom in beautiful, sunny Arizona or have one of our professional trainers visit your firm. Several class topics are available, including:

- **The Basics** (1 Day) - A tightly focused introductory training session, with an emphasis on the case management aspect of the software.
- **The Advanced** (2 Days) - An extended, intensive training course, providing thorough instruction on the entire TrialDirector program. Includes training on how to create and edit video clips from digitized video depositions.
- **Trial Boot Camp** (1 Day) - An intense, focused training session for 'up to the wire' trial preparation. The Trial Boot Camp is specifically designed for trial attorneys and their support staff who need immediate, specialized training and assistance in preparing for trial. We work with your own case material, and will focus on your specific needs rather than using our standard outlines. We'll also assist you in using PowerPoint and TrialDirector's PowerPoint plug-in, and designing opening and/or closing presentation(s).

For pricing, availability, and enrollment, call 800-828-8292 or email sales@indatacorp.com.

Certified TrialDirector Trainers in Your Area

inData has a network of certified TrialDirector trainers across the country. If you prefer a local presence for your training needs, inData will gladly refer you to a certified TrialDirector trainer in your area. For references, call 1-800-828-8292 or email sales@indatacorp.com.

Help Menu

Sometimes it's easy to forget that help is just a click away, but it is! Accessed directly from within TrialDirector, the Help file allows you to search for topics and get specific answers to your questions, with step-by-step instructions for using various features.

TrialDirector Quick Start Guide

This simple guide walks you through the most commonly used features of TrialDirector. A hard copy of the Quick Start Guide is included with the software, and available in Acrobat® PDF form on inData's Web site. (Additional hard copies are available upon request for a minimal charge.) Getting Started information is also available in the Help file.

Contacting inData

inData Corporation
1325 N. Fiesta Blvd., Suite 4
Gilbert, AZ 85233 USA
www.indatacorp.com

Phone: 480-497-8595
Toll Free: 877-inData9 (877-463-2829)
Fax: 480-497-1833

Sales: 800-828-8292

Technical Support: 480-497-0066

Useful E-Mail Addresses

Sales	sales@indatacorp.com
Technical Support	support@indatacorp.com
General Information	info@indatacorp.com

Technical Support

Technical Support is available with every inData software product, 24 hours a day, 7 days a week on the inData Web site at www.indatacorp.com. Visit the Tech Notes, Tips & FAQ's page for helpful "How to" hints on all inData products.

Phone: 480-497-0066
Fax: 480-497-1833
E-Mail: support@indatacorp.com

Standard Technical Support: This service provides telephone or e-mail support to clients Monday through Friday, 9:00 AM - 8:00 PM Eastern Standard Time - Excluding Holidays.

Getting Started with TrialDirector

Getting Started With TrialDirector

Welcome to TrialDirector, trial presentation software for attorneys and litigation support professionals. TrialDirector helps you organize exhibits and depositions, prepare cases for trial, and enhance case presentations. Whether you're working with documents, images, photographs, transcripts, video testimony, or animations, you can easily view, manage, and present them using TrialDirector.

This guide is divided into four main sections:

- **Navigating in TrialDirector –** Shows you the modules and tabs within TrialDirector
- **Creating and Organizing Your Case** – Explains how to create a new case file and add items to your case.
- **Preparing for Trial** – Details basic case preparation, including how to add mark-ups to images, add issue codes to transcripts, create focused video clips from transcripts, and use workbooks to organize exhibits.
- **Presenting at Trial** – Introduces the Presentation mode and explains how to retrieve exhibits, mark up exhibits, and display video clips.

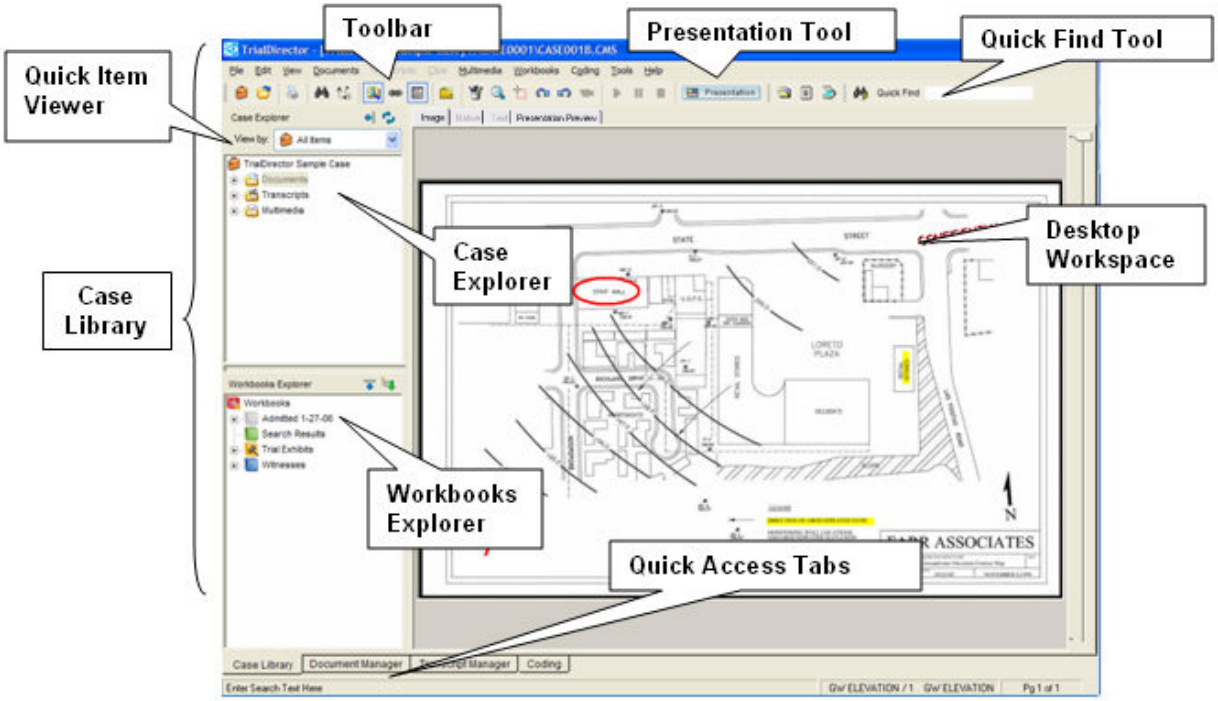
Other Resources

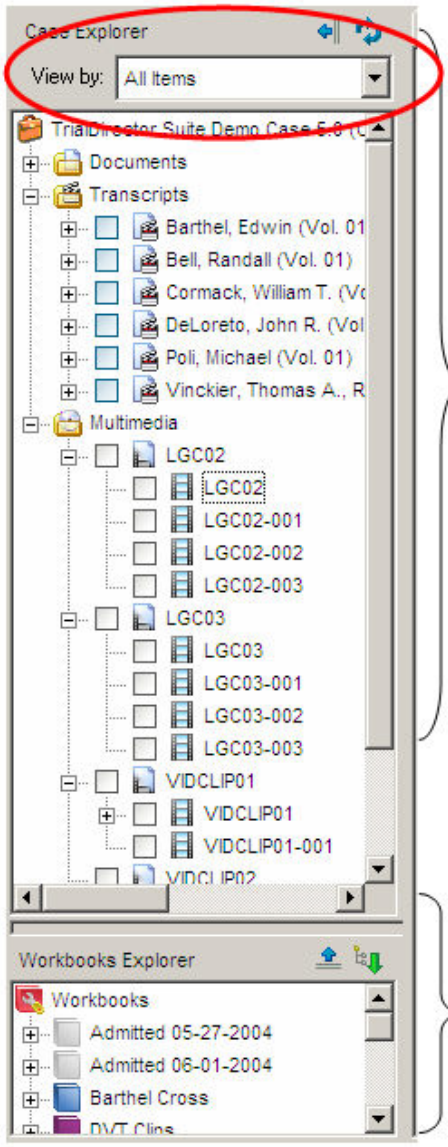
This guide provides a basic introduction to TrialDirector. Check out our other valuable resources to help you tap into the powerful features of the program:

- **Tutorials** – Several free tutorials are available on inData's Web site (www.indatacorp.com).
- **Training** – Contact inData's Training Department at 800-828-8292 or visit inData's Web site to learn about our training classes.
- **Technical Support** – The Technical Support staff is available Monday through Friday from 9 a.m. to 8 p.m. Eastern Time (excluding holidays) at 480-497-0066 to help you with any questions you may have about TrialDirector.

Navigating in TrialDirector

The diagrams below explain the main features of the TrialDirector interface. To explore these featues, open the sample case provided with the program.


Toolbar
Presentation Tool
Quick Find Tool
Quick Item Viewer
Case Explorer
Desktop Workspace
Case Library
Workbooks Explorer
Quick Access Tabs



The **Case Library** consists of the ***Case Explorer*** and the ***Workbooks Explorer***.

At the top of the **Case Explorer** is a listing of all of the items in your case, organized by categories:

- ***Documents*** (including images, photographs and native files)
- ***Transcripts*** (including text only and video synchronized transcripts)
- ***Multimedia*** files (including animations)

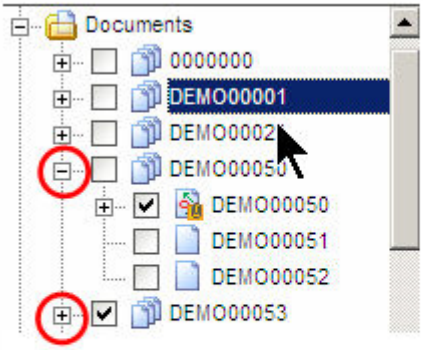
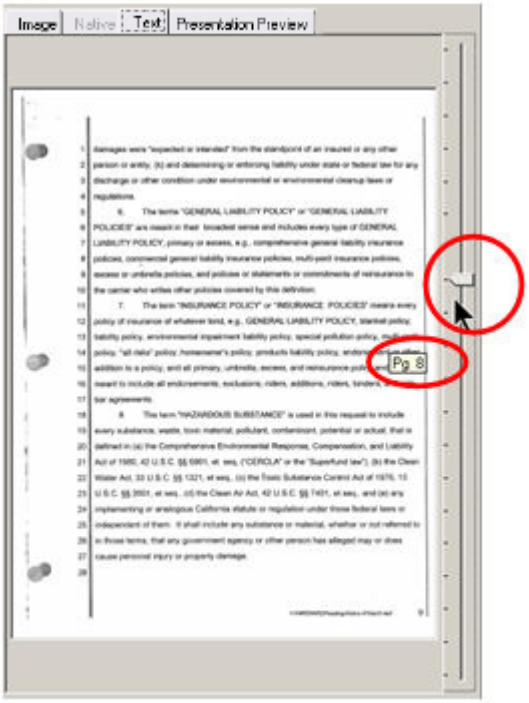
To view particular categories of items, click on the pull-down arrow next to the **View By:** window and select the category you want to view.

At the bottom is the **Workbooks Explorer.** When you first start a case in TrialDirector, three workbooks appear in this section:

- ***Search Results***
- ***Trial Exhibits***
- ***Witnesses***

You can create additional workbooks, too, for opening and closing arguments, individual witnesses, or any other category you want. TrialDirector creates some for you as you work with your exhibits. For example, add a number to the Trial Ex. Field for one of your items, and a reference to that item is added to the Trial Exhibits Workbook. During trial, as you identify admitted exhibits, a new Admitted Workbook appears for each trial day.

View Items

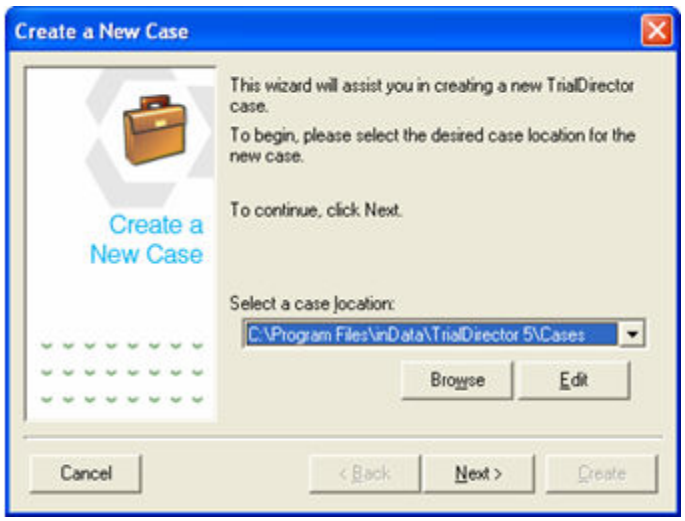
• Click on a document (item) ID and the first page of the document appears in the workspace area to the right of the Case Explorer • Click on the + sign next to the item ID (or folder) to view page list (or folder contents) • Click on the – sign next to the item ID (or folder) to contract the document page list (or contents) • Use the scrollbar to move through a long list of items in the Case Explorer	
To move between pages of a multi-page document, drag the slider tool to the right of the document image. A tip window appears identifying the page location within the document.	

Creating and Organizing Your Case

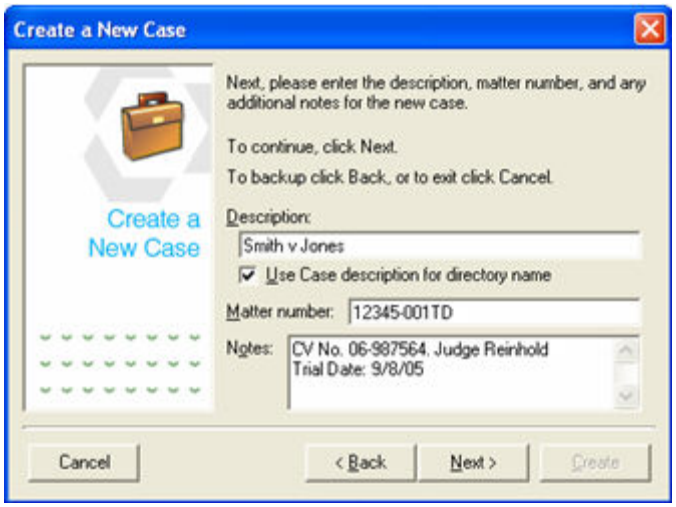
Creating a Case

The first step in trial presentation is to create a case in TrialDirector.

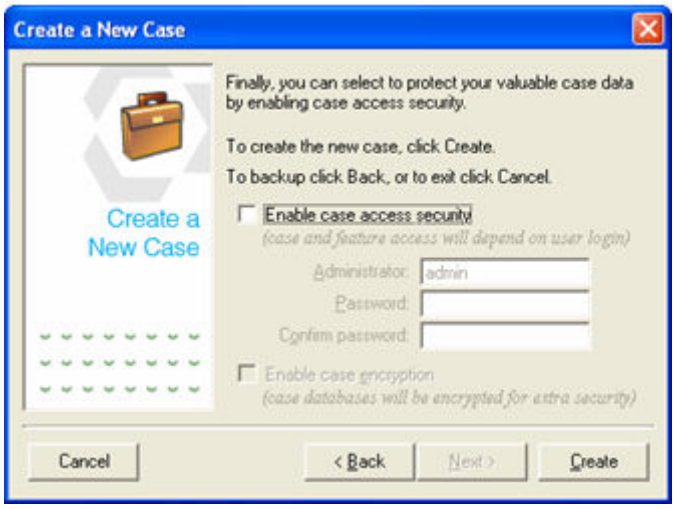
1. Click on the tool on the toolbar OR open the **File** menu and select **Create a New Case…**
2. Either accept the default location shown in the dialog box or browse to the location where the new case will be stored. By default, TrialDirector creates a Cases folder within the folder that contains the TrialDirector software.


Create a New Case
This wizard will assist you in creating a new TrialDirector case.
To begin, please select the desired case location for the new case.
To continue, click Next.
Create a New Case
Select a case location:
C:\Program Files\inData\TrialDirector 5\Cases
Browse
Edit
Cancel
< Back
Next >
Create

3. Click **Next** and enter information about your case.


Create a New Case
Next, please enter the description, matter number, and any additional notes for the new case.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Create a New Case
Description:
Smith v Jones
Use Case description for directory name
Matter number:
12345-001TD
Notes:
CV No. 06-987564, Judge Reinhold
Trial Date: 9/8/05
Cancel
< Back
Next >
Create

4. Click **Next** again. If you want, you can assign a password and other security to your case. See Enable Case Security for additional information.


Create a New Case
Finally, you can select to protect your valuable case data by enabling case access security.
To create the new case, click Create.
To backup click Back, or to exit click Cancel.
Create a New Case
Enable case access security
(case and feature access will depend on user login)
Administrator:
admin
Password:
Confirm password:
Enable case encryption
(case databases will be encrypted for extra security)
Cancel
< Back
Next >
Create

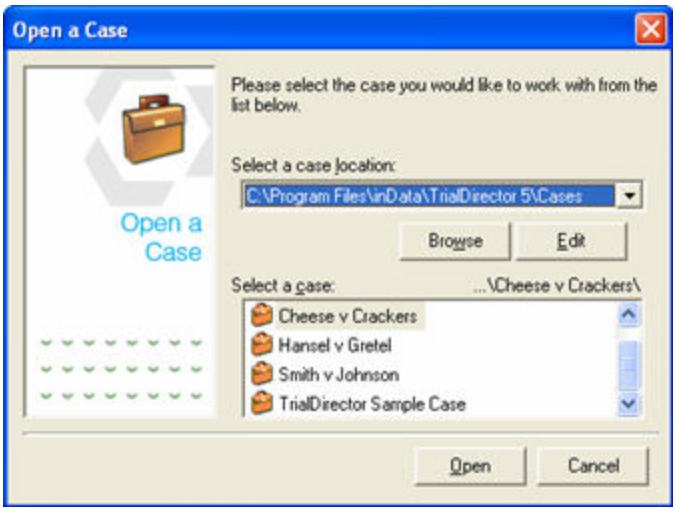
5. Click **Create**.

   Tip: If you're using TrialDirector as an add-in to CT Summation iBlaze/Enterprise or Concordance, a new case is created for you when you activate the add-in. See the Application Integration section in the TrialDirector Help file for additional information.

Opening an Existing Case

To open an existing case in TrialDirector:

1. Click the tool on the toolbar.



2. Your case names will appear in the **Select a case** box. Click on the name of the case to select it, then click **Open**. (If the case you wish to open does not appear in the list, browse to the location where the case is stored.)

Adding Items to the Case

After you create a case, you will need to add items to it. The types of items that can be viewed in TrialDirector include:

- Images
- Photographs
- Native files (Microsoft Word, PowerPoint, Excel, Acrobat, and so on)
- Transcript text
- Video synchronized with transcript text
- Multimedia (animations, video and audio files)

To access these items from within TrialDirector, you must import them to your case. Adding items can be done by (1) dragging and dropping the item onto the Case Explorer tree, (2) using the Add Items dialog box or (3) scanning documents or photographs directly into TrialDirector. (For instructions on scanning documents directly into TrialDirector, see Scan Items into a Case in the Help file.)

When adding items using drag-and-drop or the Add Items dialog box, you can add items one at a time or in batches, using a "load file." Load files are usually provided by vendors or may be created using higher end scanning programs. A load file automates the process of adding items to your case. TrialDirector accepts load files in the following formats.

Accepted Batch Load File Formats

(Note: The "name" of the load file represents the 3-character file extension, e.g., Jones.OLL is a load file named "Jones" that was created specifically for TrialDirector. Jones.DII is a load file named "Jones" created to load images into CT Summation Enterprise or iBlaze.)

- OLL (TrialDirector®)
- DII (CT Summation®)
- LPT (IPRO®)
- TXT or DBF (Doculex®)
- LOG (Opticon® or generic load file)

Adding Items Using Drag and Drop

1. Arrange your Windows desktop so that you can view both the TrialDirector Case Explorer pane and the Windows Explorer (or My Computer) pane.
    - If the items are on a CD or DVD, you should copy them to the drive on which you want to store them before you load them into TrialDirector.

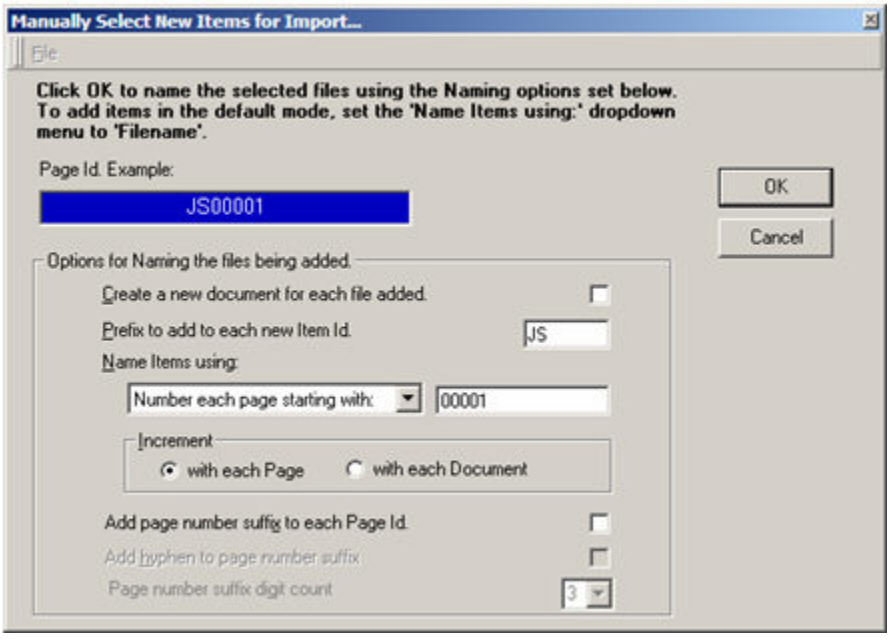
    [**Practice tip:** Within the case folder where the rest of your case information resides, you may wish to create folders for the various types of items you are adding. For example, you may wish to create folders called Images, Video, Animations, Native Files, and Transcripts.]

2. In the Windows Explorer (or My Computer) window, navigate to the location of the items you want to add to TrialDirector.
3. Select the item(s) you want to add to TrialDirector. Once they are selected, drag the items from the Windows Explorer (My Computer) window and drop them onto TrialDirector's Case Explorer pane.

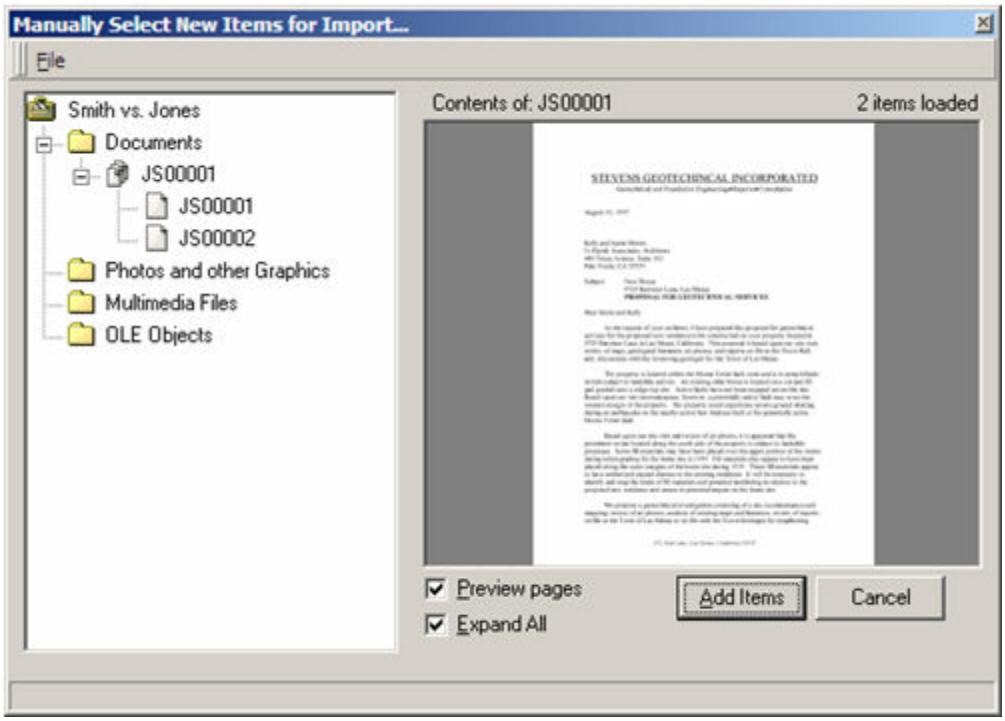
    - Use CTRL+[click] to select multiple non-adjacent items or SHIFT+[click] to select multiple adjacent items.
    - If you are adding single-page TIF images to TrialDirector, take care when adding files using this method that you add only one document at a time. If you add more than one single page TIF document at once, the individual documents will be added as a single multi-page document. (They can be separated later within TrialDirector, but it's simpler to add them individually.) On the other hand, if you are adding multi-page TIF images, each file represents an entire document.
    - You do not need to be concerned with where to drop the items within the Case Explorer. TrialDirector will determine the correct type of item and its folder in the Case Explorer.

4. Decide on the method you want to use for naming the files being added to TrialDirector. After you make your selections and confirm that the identification is what you want, click **OK**.

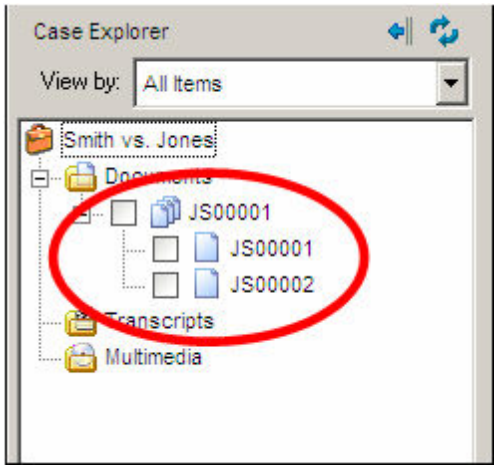
- In the following example, the item will be named JSS0001. If it is a multi-page document, each page is assigned the next unique number.
- Note that an example of the TrialDirector naming is displayed in the dialog box.


Manually Select New Items for Import...
File
Click OK to name the selected files using the Naming options set below.
To add items in the default mode, set the 'Name Items using:' dropdown menu to 'Filename'.
Page Id. Example:
JS00001
OK
Cancel
Options for Naming the files being added.
Create a new document for each file added.
Prefix to add to each new Item Id.
JS
Name Items using:
Number each page starting with:
00001
Increment
with each Page
with each Document
Add page number suffix to each Page Id.
Add hyphen to page number suffix
Page number suffix digit count
3

5. Click **Add Items** in the following dialog box to load the items into TrialDirector.

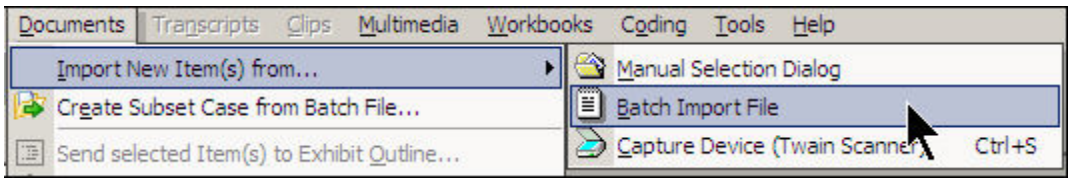


The items you added now appear in TrialDirector's Case Explorer. In this example, the added items were images of documents, so they appear under the Documents folder in the Case Explorer.



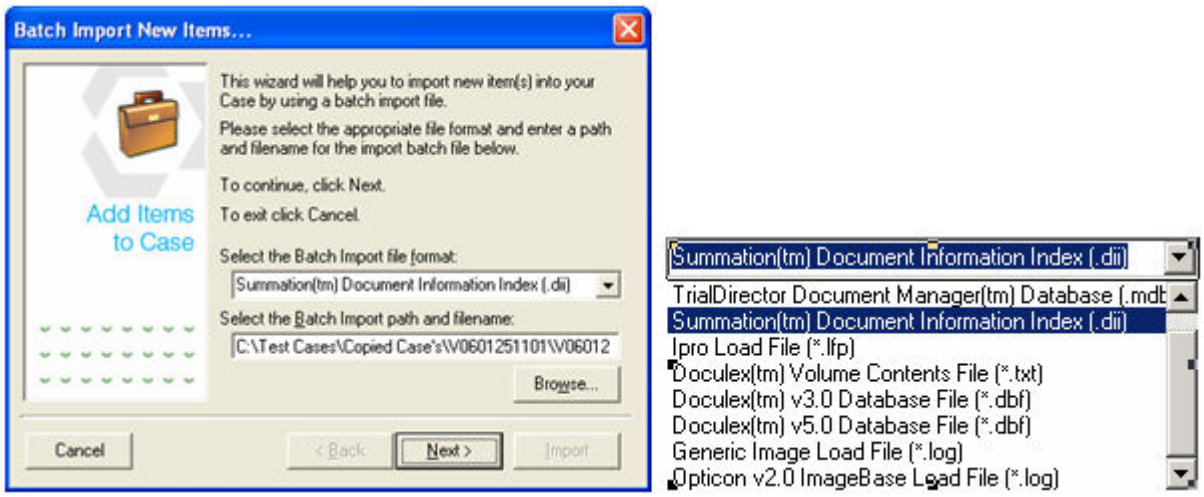
Within the *Documents* folder, there is now an item for the two-page document (JS00001) and then, within that document, you see entries for individual pages of the document. You can now work with the document in its entirety or just with individual pages of the document, if that is appropriate for your situation.

Adding Items Using a Batch Load File

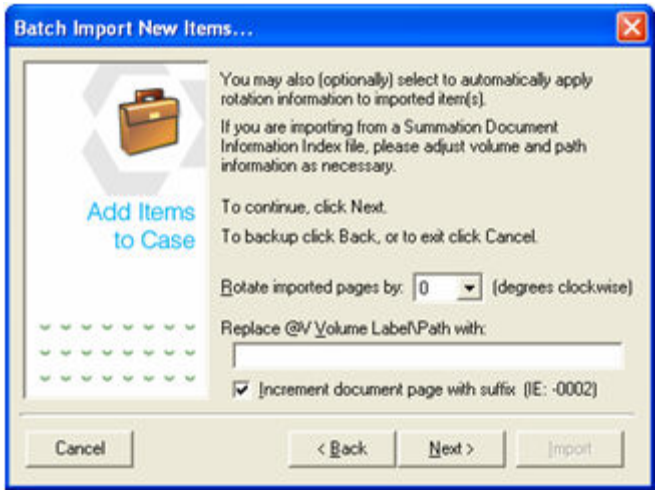


You can use the same drag-and-drop technique described above with batch load files or you can use TrialDirector's Document Import dialog.

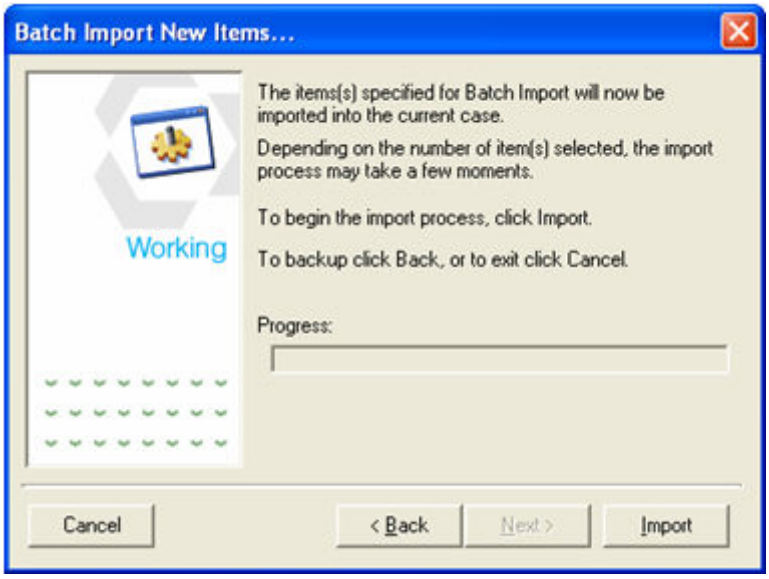
1. Click on the **Documents** menu, select **Import New Item(s) from...** and select **Batch Import File** from the drop-down menu.


Batch Import New Items...
This wizard will help you to import new item(s) into your Case by using a batch import file.
Please select the appropriate file format and enter a path and filename for the import batch file below.
To continue, click Next.
To exit click Cancel.
Add Items to Case
Select the Batch Import file format:
Summation(tm) Document Information Index (.dii)
Select the Batch Import path and filename:
C:\Test Cases\Copied Case's\V0601251101\V06012
Browse...
Cancel
< Back
Next >
Import
Summation(tm) Document Information Index (.dii)
TrialDirector Document Manager(tm) Database (.mdb
Summation(tm) Document Information Index (.dii)
Ipro Load File (*.lfp)
Doculex(tm) Volume Contents File (*.txt)
Doculex(tm) v3.0 Database File (*.dbf)
Doculex(tm) v5.0 Database File (*.dbf)
Generic Image Load File (*.log)
Opticon v2.0 ImageBase Load File (*.log)

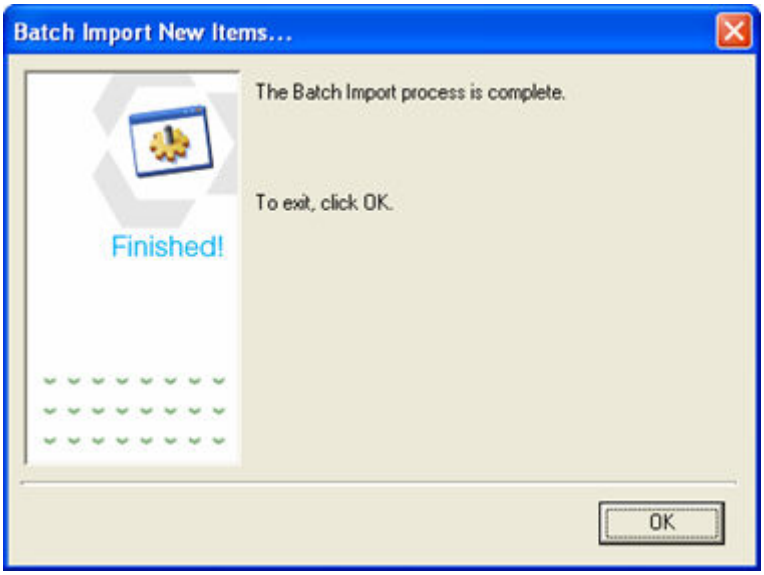
2. Click on the drop-down arrow to locate the file format of the load file you're using. If necessary, click on the **Browse** button to navigate to the location of the load file. Once you have selected the file format and located the file, click **Next**.
3. The following dialog provides options to set a standard rotation for images and to adjust some settings for better viewing of images within Summation. See Import Image Information from Summation in the Help file for more details about this dialog. Click **Next**.


Batch Import New Items...
Add Items to Case
You may also (optionally) select to automatically apply rotation information to imported item(s).
If you are importing from a Summation Document Information Index file, please adjust volume and path information as necessary.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Rotate imported pages by: 0 (degrees clockwise)
Replace @V Volume Label\Path with:
Increment document page with suffix (IE: -0002)
Cancel
< Back
Next >
Import

4. Click **Import** on the following dialog, and the progress bar will advance as items are loaded into your case.


Batch Import New Items...
Working
The items(s) specified for Batch Import will now be imported into the current case.
Depending on the number of item(s) selected, the import process may take a few moments.
To begin the import process, click Import.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Import

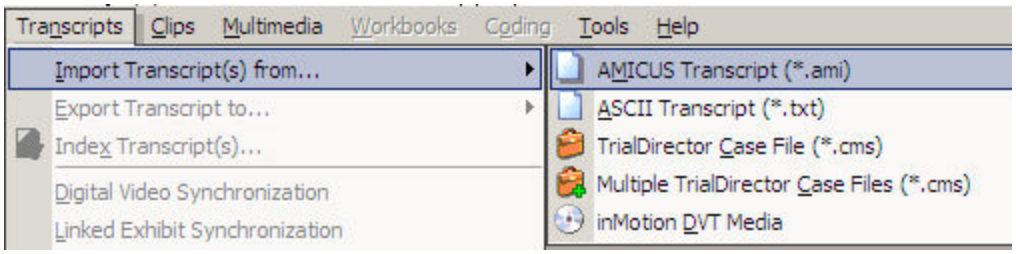
5. After the batch processing is completed, you will see the following dialog. Click **OK** to view the items that were added to your case.



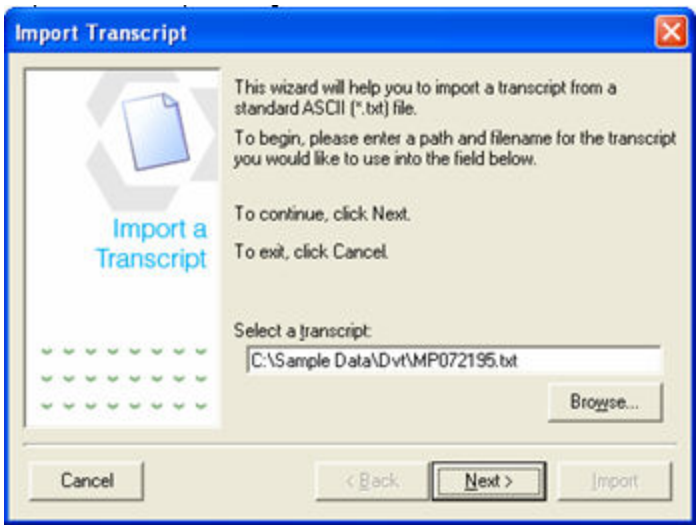
Adding Transcripts

TrialDirector can load transcripts (text-only transcripts or transcripts synchronized with video) in a variety of formats, including ASCII, AMICUS, DVT (Digital Video Transcript media), or a TrialDirector case file (CMS).

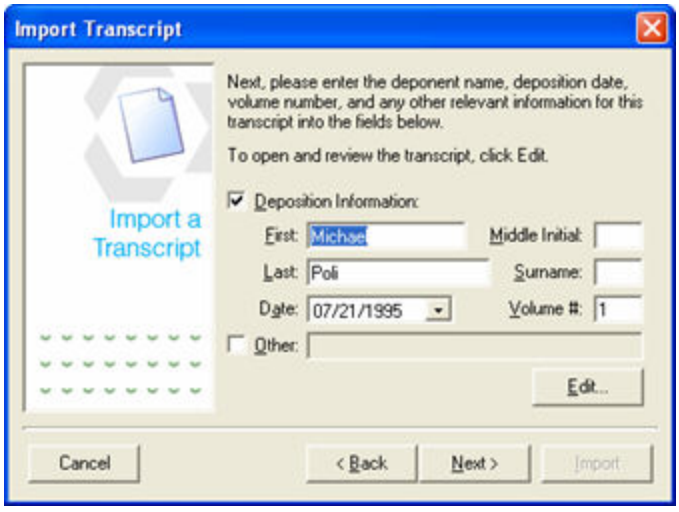
1. Click on the Transcript Manager tab at the bottom of the TrialDirector desktop.
2. Using the drag and drop technique described previously, drag and drop the transcript file onto the Transcript Explorer pane OR click the **Transcripts** menu, select **Import Transcript(s) from…**, and select the appropriate format from the list.



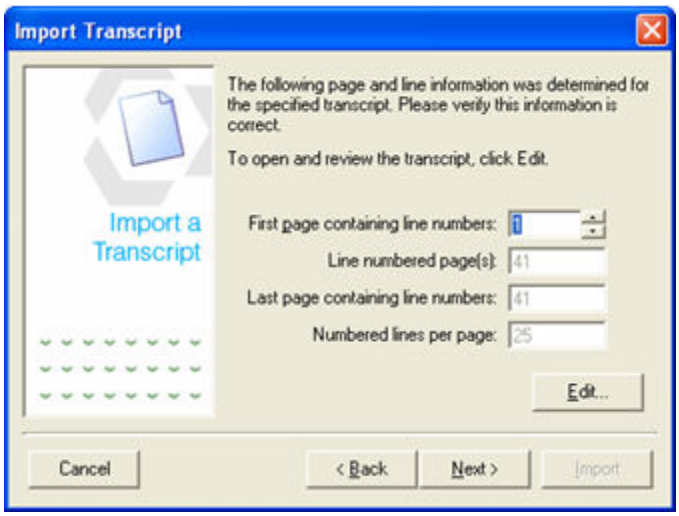
3. The Import Transcript wizard opens. Click the **Browse** button and locate the transcript you wish to load. When you select the transcript, the path and the selected transcript file appear in the Import Transcript dialog. Click **Next**.


Import Transcript
This wizard will help you to import a transcript from a standard ASCII (*.txt) file.
To begin, please enter a path and filename for the transcript you would like to use into the field below.
To continue, click Next.
To exit, click Cancel.
Import a Transcript
Select a transcript:
C:\Sample Data\Dvt\MP072195.txt
Browse...
Cancel
< Back
Next >
Import

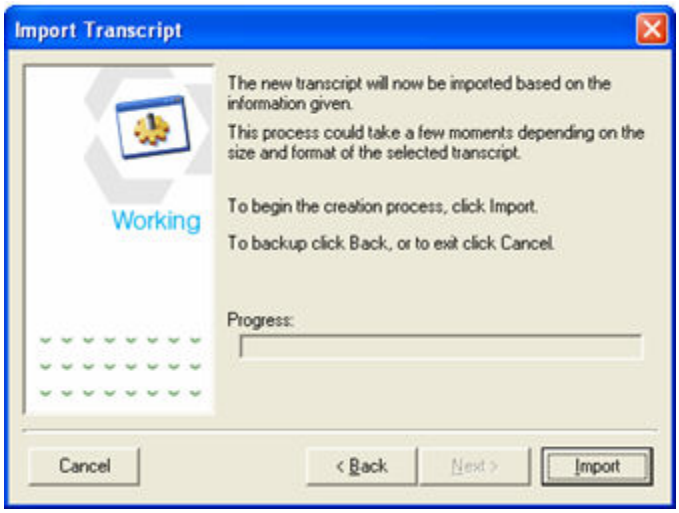
4. Review and modify, if necessary, the deposition information. If you need to review the transcript, click **Edit**. If the information is correct, click **Next**.



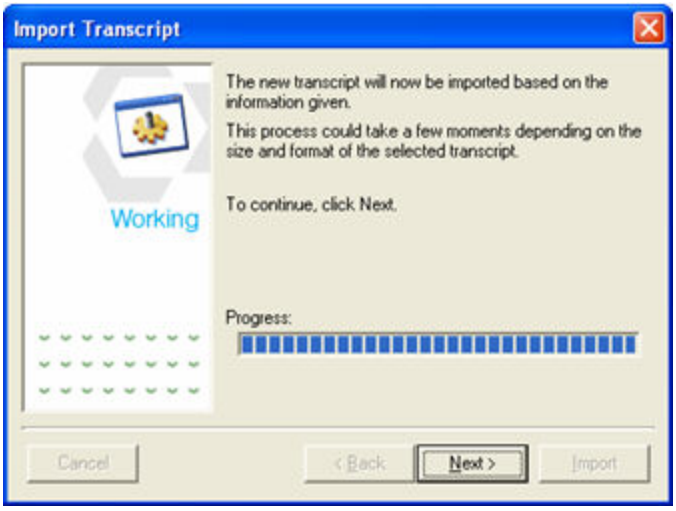
5. Verify that the pagination is accurate in the following dialog box. This is important in order to be sure that your page and line references are correct.


Import Transcript
Import a Transcript
The following page and line information was determined for the specified transcript. Please verify this information is correct.
To open and review the transcript, click Edit.
First page containing line numbers: 1
Line numbered page(s): 41
Last page containing line numbers: 41
Numbered lines per page: 25
Edit...
Cancel
< Back
Next >
Import

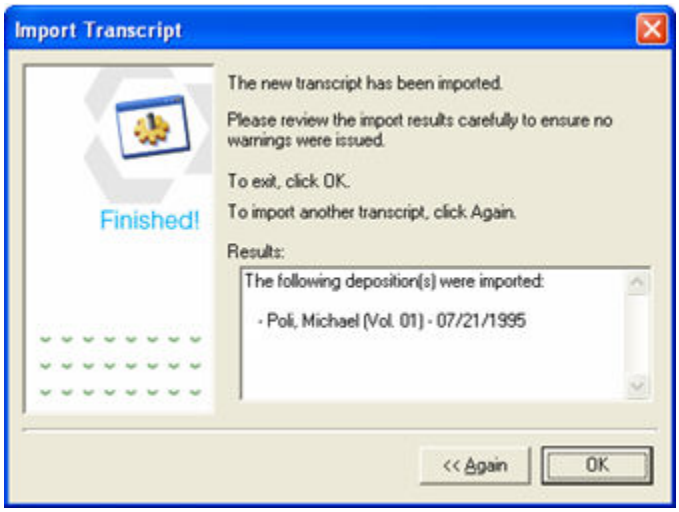
6. Click **Import** to load the transcript into your case.


Import Transcript
Working
The new transcript will now be imported based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
To begin the creation process, click Import.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Import

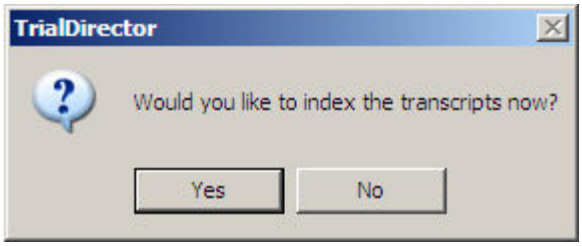
7. When the progress bar reaches the end, click **Next**.


Import Transcript
The new transcript will now be imported based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To continue, click Next.
Progress:
Cancel
< Back
Next >
Import

8. When the transcript import process is complete, you can click either **OK** to return to the Transcript Manager window or you can click **Again** to load another transcript.


Import Transcript
The new transcript has been imported.
Please review the import results carefully to ensure no warnings were issued.
To exit, click OK.
To import another transcript, click Again.
Finished!
Results:
The following deposition(s) were imported:
- Poli, Michael (Vol. 01) - 07/21/1995
<< Again
OK

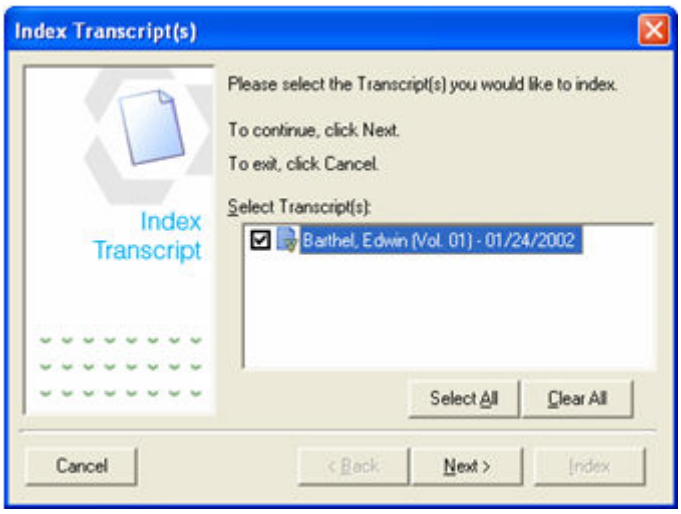
9. You will be prompted to index the transcripts. **This is an important step!** Without indexing the transcripts, you will not be able to search or view the word index of the transcripts you added. So click **Yes** when prompted or click **No** to index later.



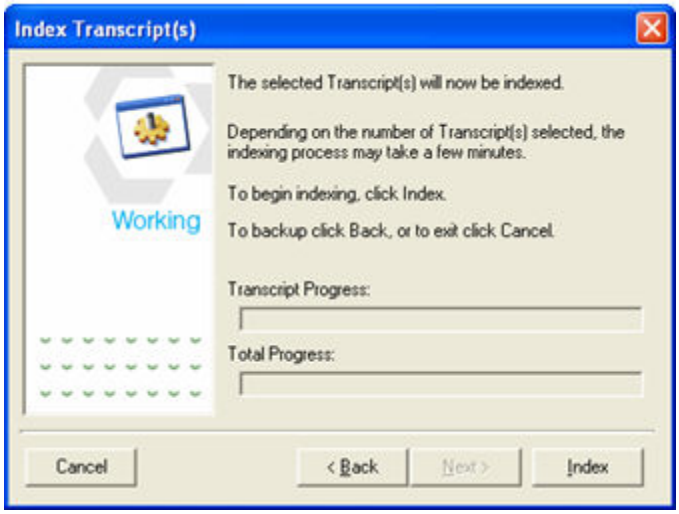
Indexing Transcripts

If you choose not to index the transcripts when they are loaded, you can index them later from within the Transcript Manager. To do so:

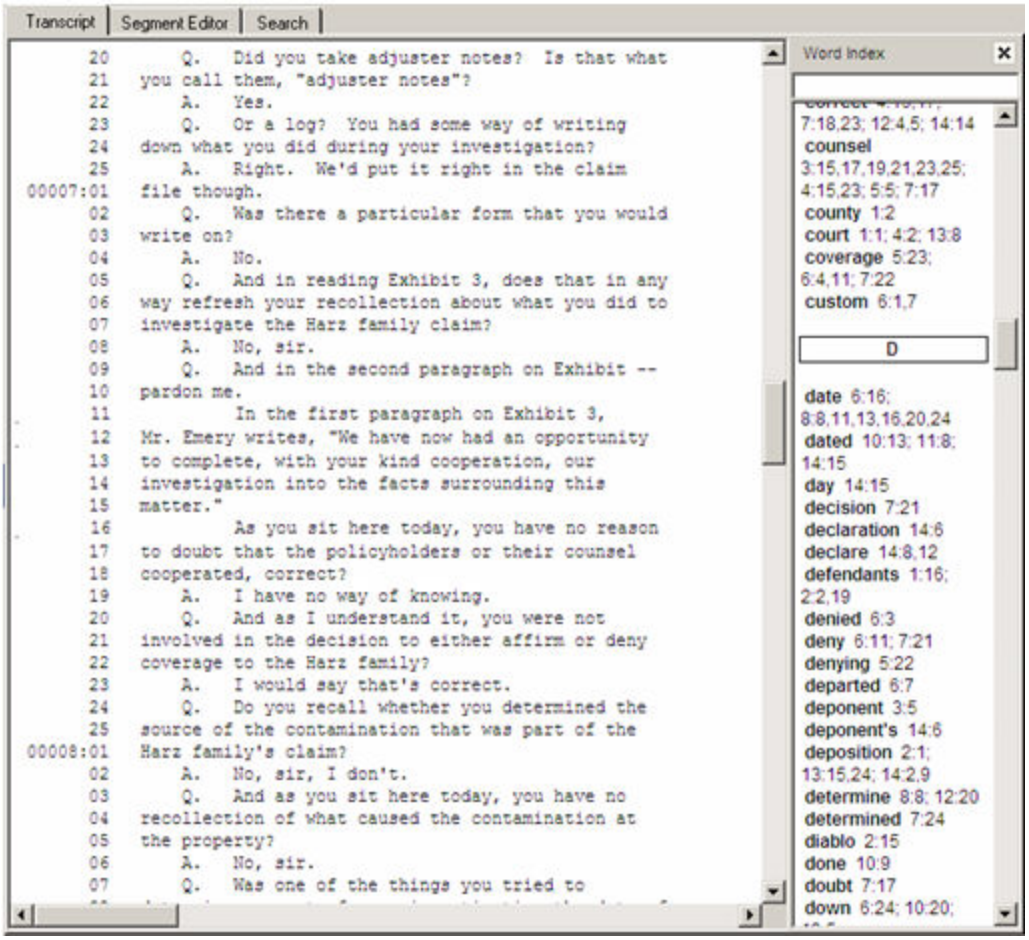
1. In the Transcript Manager, select the **Transcripts** menu and select **Index Transcripts…**.



2. The transcripts requiring indexing are listed. Select one or more transcripts (or click **Select All** to choose all of the transcripts). Then click **Next**.
3. Select **Index** and allow the program to index the transcripts.


Index Transcript(s)
The selected Transcript(s) will now be indexed.
Depending on the number of Transcript(s) selected, the indexing process may take a few minutes.
To begin indexing, click Index.
To backup click Back, or to exit click Cancel.
Working
Transcript Progress:
Total Progress:
Cancel
< Back
Next >
Index

4. When indexing is completed, click **OK**. Now you will be able to search the contents of the transcript as well as view the list of words contained within the transcript.


Transcript
Segment Editor
Search
Word Index
Q. Did you take adjuster notes? Is that what you call them, "adjuster notes"?
A. Yes.
Q. Or a log? You had some way of writing down what you did during your investigation?
A. Right. We'd put it right in the claim file though.
Q. Was there a particular form that you would write on?
A. No.
Q. And in reading Exhibit 3, does that in any way refresh your recollection about what you did to investigate the Harz family claim?
A. No, sir.
Q. And in the second paragraph on Exhibit -- pardon me.
In the first paragraph on Exhibit 3, Mr. Emery writes, "We have now had an opportunity to complete, with your kind cooperation, our investigation into the facts surrounding this matter."
As you sit here today, you have no reason to doubt that the policyholders or their counsel cooperated, correct?
A. I have no way of knowing.
Q. And as I understand it, you were not involved in the decision to either affirm or deny coverage to the Harz family?
A. I would say that's correct.
Q. Do you recall whether you determined the source of the contamination that was part of the Harz family's claim?
A. No, sir, I don't.
Q. And as you sit here today, you have no recollection of what caused the contamination at the property?
A. No, sir.
Q. Was one of the things you tried to
counsel
county 1:2
court 1:1; 4:2; 13:8
coverage 5:23;
custom 6:1,7
D
date 6:16;
dated 10:13; 11:8;
day 14:15
decision 7:21
declaration 14:6
declare 14:8,12
defendants 1:16;
denied 6:3
deny 6:11; 7:21
denying 5:22
departed 6:7
deponent 3:5
deponent's 14:6
deposition 2:1;
determine 8:8; 12:20
determined 7:24
diablo 2:15
done 10:9
doubt 7:17
down 6:24; 10:20;

Preparing for Trial

TrialDirector gives you the option to assign issue identities (such as elements of proof, defenses, and specific witnesses) to documents, transcript testimony and other pieces of potential evidence in your case.

You can search document indexes, the content of documents (if they were run through a full-text process), and testimony. Attach memos and notes to items in your case. Add highlighting, redactions, and other mark-ups (Annotations) to images in your case in order to focus on key points you may want to pursue. Mark-ups can also be displayed during presentation in the courtroom, or you can create mark-ups "on the fly" in presentation mode. (For suggestions on using mark-ups during your presentation, see the Presenting at Trial section of this Guide.)

Working with Coding

Information about the documents in your case may be imported into TrialDirector from other database programs, such as CT Summation Enterprise or iBlaze. You can also enter information directly into TrialDirector's Coding tab. Certain fields from the Coding tab can be

synchronized with the items listed on the Documents tab using TrialDirector's synchronization feature.

The benefit to having brief descriptive information about each of the items in your case is to make it easier later to locate those documents within your case. You can also use the database to sort the information chronologically, for example, or perhaps by author. Since entering information about your documents (also known as "coding") can be time-intensive, you may simply wish to limit coding to those items that are going to be used at trial.

Issue-Coding: Many litigators use issue coding to help categorize the evidence in their cases, even if they don't refer to the process as "issue-coding." For example, you may attach sticky notes or scribble a word or two in the margin of transcripts in order to remind you of the topic the testimony relates to. You may have several file folders on your desk, each one of which relates to a particular topic or element of proof or defense or witness. As you come across documents and transcripts of testimony that relate to any of these, you may make a copy of the document or transcript page and toss it into the file folder. You can do this electronically in TrialDirector, color coding bits of transcripts, annotating documents, and collecting them in workbooks.

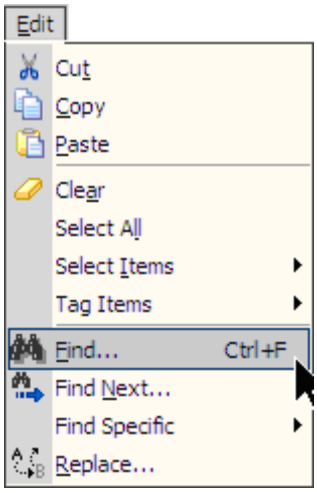
Practice Tip: *Keep your list of issues simple. The more complex an issues list becomes, the more difficult it is to use.*

Finding Items in Your Case

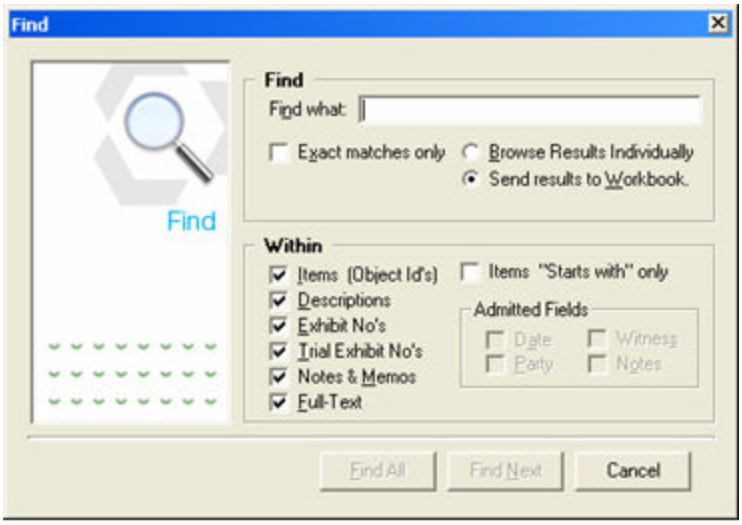
It's easy to locate items in the Case Explorer using the Find tool. You can search for any of the following criteria:

- Item ID number (e.g., DEMO00002)
- Description (a brief "shorthand" title for the item to help you identify it quickly during trial)
- Exhibit No. (deposition exhibit number)
- Trial Exhibit No. (trial exhibit number)
- Notes & Memos (the contents of the Summary field, if data is imported from Summation. Alternatively, you can easily add memos to any of the items in your case.)

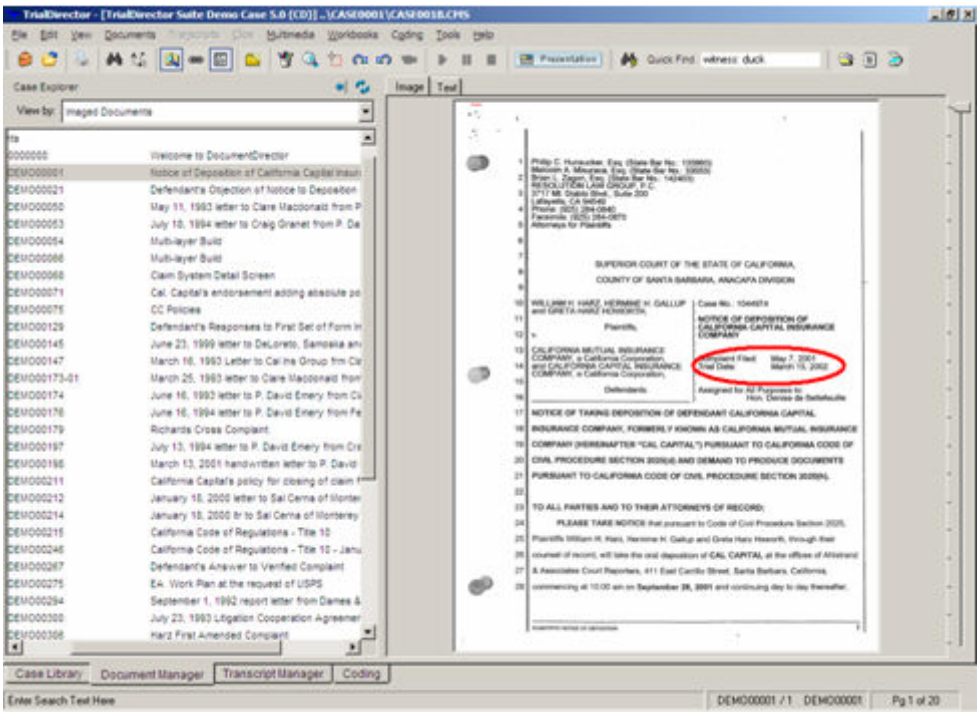
1. Click on the tool on the toolbar OR click on the **Edit** menu and select **Find...**



2. In the **Find** dialog, enter the word you want to look for and the other criteria for your search.



- To view each item one at a time on the desktop, select **Browse Results Individually**. Click **Find First** to display the first item. Click **Find Next** to continue viewing each of the other items found as a result of the search.



- To view all of the items at once, select **Send Results to Workbook**. Click **Find All** to run the search. A **Search Results** workbook is created in the Workbook Explorer section of the Case Library. From there, you can view all of the items located as a result of your search.

Finding Testimony in Transcripts

TrialDirector gives you several methods to locate testimony within transcripts. You can search the Word List for each of the transcripts. You can also search within a single transcript for a word or phrase or search across multiple transcripts.

Opening a Transcript and its Word List

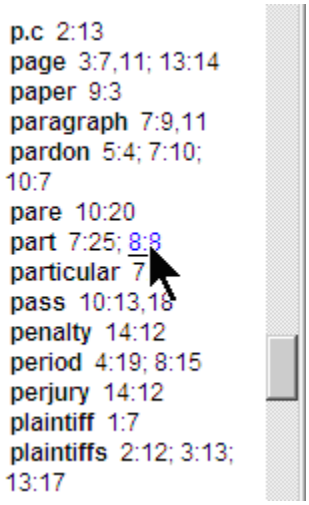
1. Click the **Transcript Manager** tab to display the transcript workspace.
2. In the Transcript Explorer, expand the transcript you wish to work with. (Click on the ⊞ to the left of the transcript name.)

   The following items may appear under your transcripts:

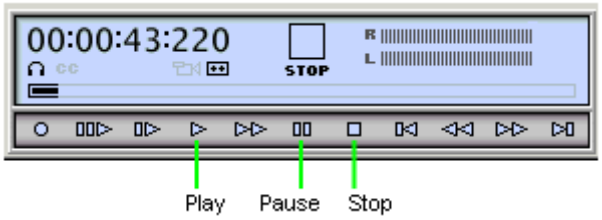
   - ASCII Transcript for [deponent's name]
   - Audio/Video for [deponent's name] (if a video version of the transcript has been loaded into your case for the selected deponent)
   - One or more Clips (each clip contains one or more segments of synchronized text and video)
   - A Virtual Clip (the synchronized text and video for the entire transcript)
   - Exhibits attached to the transcript

- Issue Codes and Annotations

3. Double-click on **ASCII Transcript for [deponent's name]**. The transcript opens on the desktop.
4. To view the Word List, with the transcript open on the desktop, click on the **View** menu and select **Word Index**.
5. When you locate a word that interests you, you can click on the page:line reference(s) adjacent to the word to jump to that point in the transcript and the synchronized video (if any).



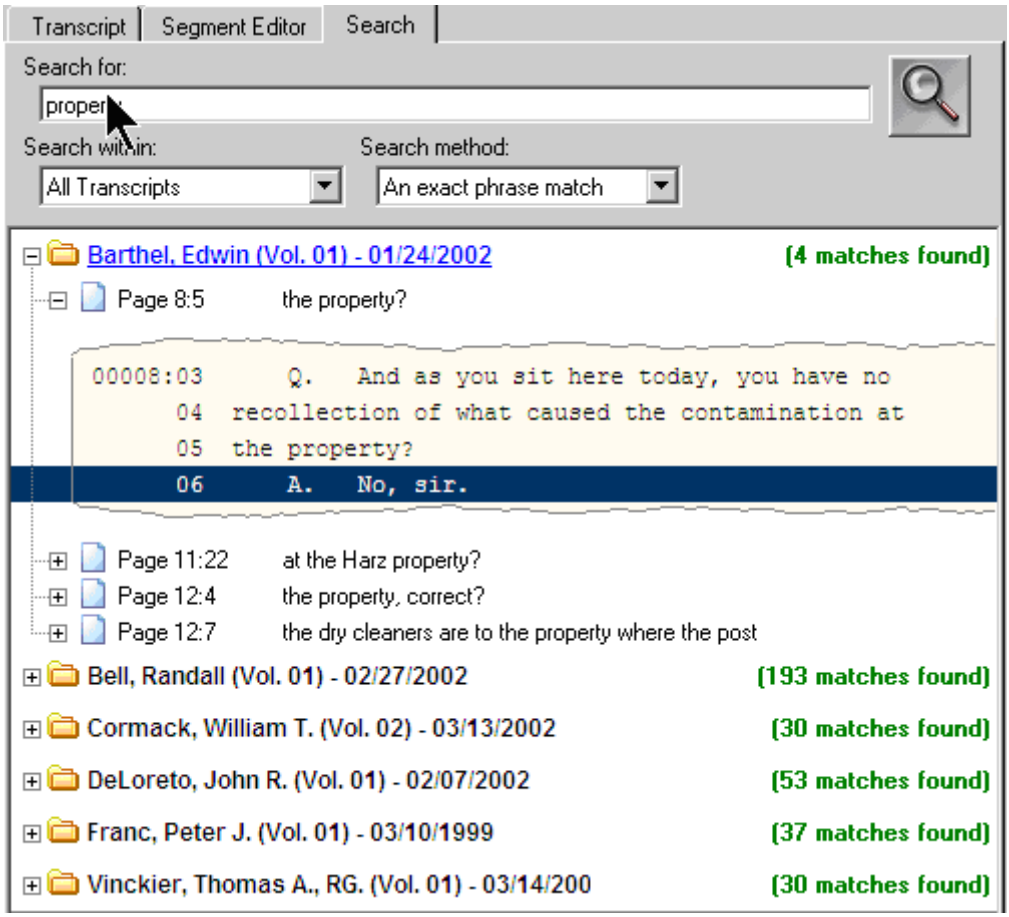
6. TrialDirector takes you to that location within the transcript and, if the transcript has associated video, the Multimedia Player displays the associated segment of the video. To play the video, click on the **PLAY** button. To stop the video playback, click on the **STOP** button.



Searching One or More Transcripts

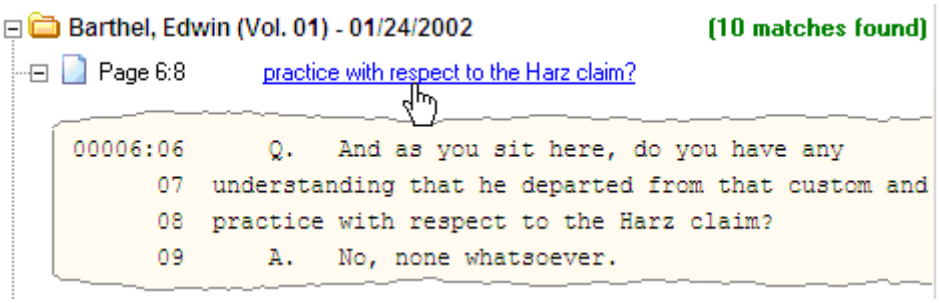
1. With a transcript open on the desktop, click the **Search** tab at the top of the desktop.
2. Enter the term(s) you want to find in the **Search for:** box.

- Use the wildcard character * to locate variations of a term. For example, search for *claim* and you will only find where that exact word appears. Search for claim*, and you will find all occurrences of *claim, claims, claimed, claiming*.



3. From the pull-down menu, select whether you want to search all of the transcripts, only selected transcripts, or only the current transcript.
4. From the Search Method pull-down menu, choose whether you want to find the exact word or phrase entered in the **Search for:** box or whether you want to develop a compound search using AND or OR.
5. After your search are specified, click on the button. A list of the transcripts containing the search term or phrase appears on the screen. The number of matches is displayed to the right of each transcript name.

    - Click on the ⊞ sign for each transcript to view a list of the page:line citations.
    - Click the ⊞ next to each page:line reference to view the question-and-answer pair in which the search term appears.
    - Click on the line of text adjacent to the page:line citation to jump to that location in the transcript.

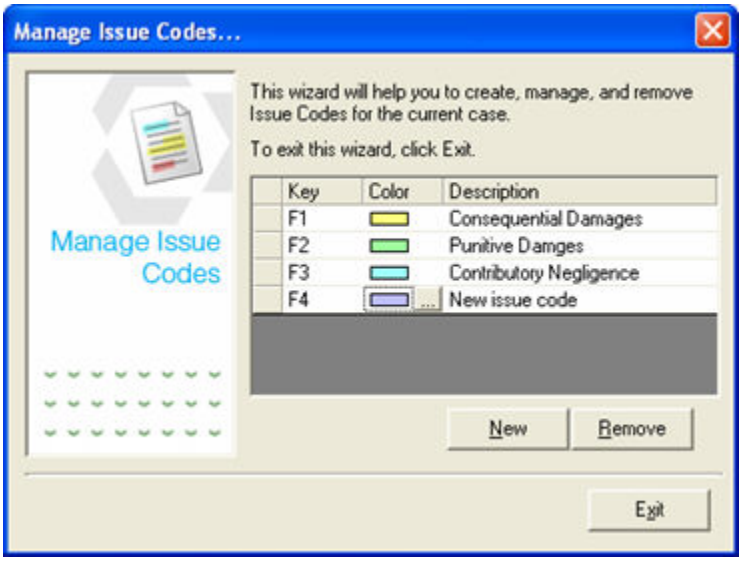

Barthel, Edwin (Vol. 01) - 01/24/2002
(10 matches found)
Page 6:8
practice with respect to the Harz claim?
00006:06 Q. And as you sit here, do you have any
07 understanding that he departed from that custom and
08 practice with respect to the Harz claim?
09 A. No, none whatsoever.

Working with Issue Codes and Transcripts

Before you assign issue codes to transcript testimony, you'll want to begin by creating the issue code list. We recommend that issue code lists be kept short and simple.

Managing Issue Codes

1. In the Transcript Manager, open the **Transcripts** menu and select **Manage Issue Codes…**.
2. In the dialog box, click the **New** button.



3. Replace the text "New Issue Code" with a short title for the issue you want to add.
4. To change the color of the highlighting that will appear in the transcript for the new issue, click on the color box. A spectrum dialog opens from which you can select a color.

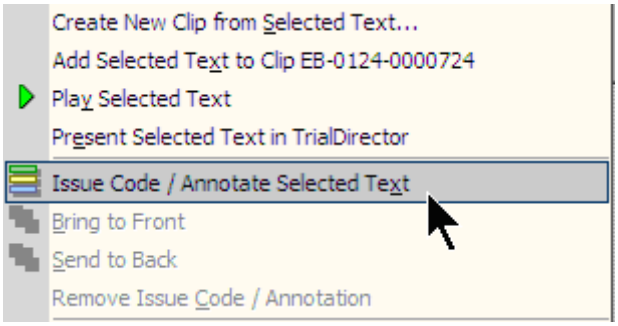
   Practice tip: *Avoid using dark colors for issue codes or you won't be able to view the testimony through the issue code highlighting.*

5. To change the function key associated with the issue, click on the F# and select the new function key from the list.

6. Continue adding issues as desired. When you are finished, click **Exit**.

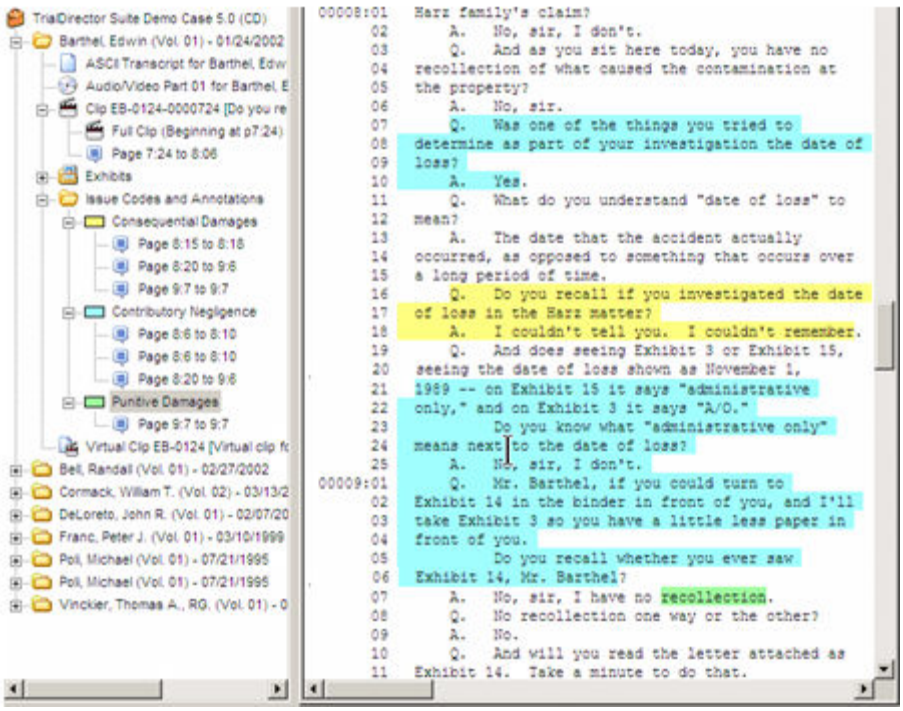
Assigning Issue Codes to Testimony

1. With a transcript open in the Transcript Manager, locate and highlight testimony to which you would like to assign one or more issue codes.


Create New Clip from Selected Text...
Add Selected Text to Clip EB-0124-0000724
Play Selected Text
Present Selected Text in TrialDirector
Issue Code / Annotate Selected Text
Bring to Front
Send to Back
Remove Issue Code / Annotation

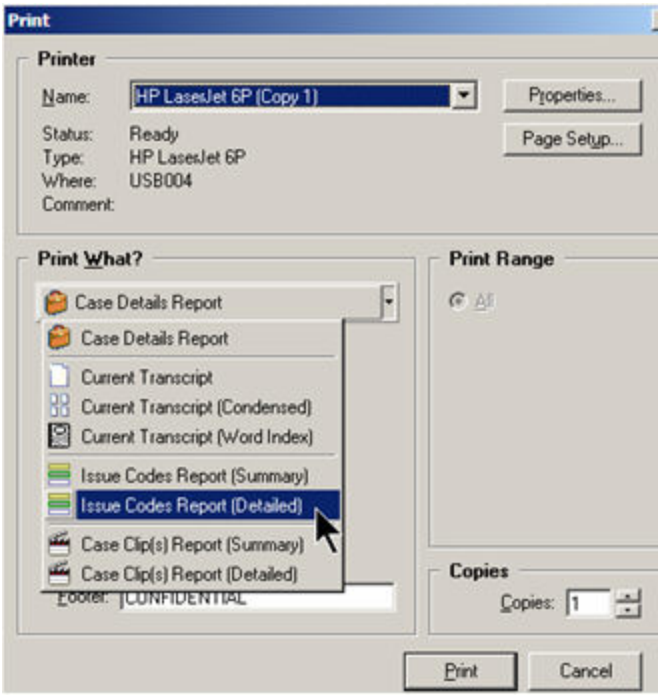
2. Right-click on the selected text, then select **Issue Code / Annotate Selected Text** from the shortcut menu. The issue code list opens.
3. Click on each of the issues that you want to assign to the text. Click **Apply**, then **Exit**. When you assign issues to text, two things happen:

    - The transcript is highlighted to reflect the color of the issue you assign. If you assign more than one issue to the same text, only the color of the last issue code appears on the screen.
    - In the Transcript Explorer, the text citation appears under Issue Codes and Annotations for that witness, organized according to issue.

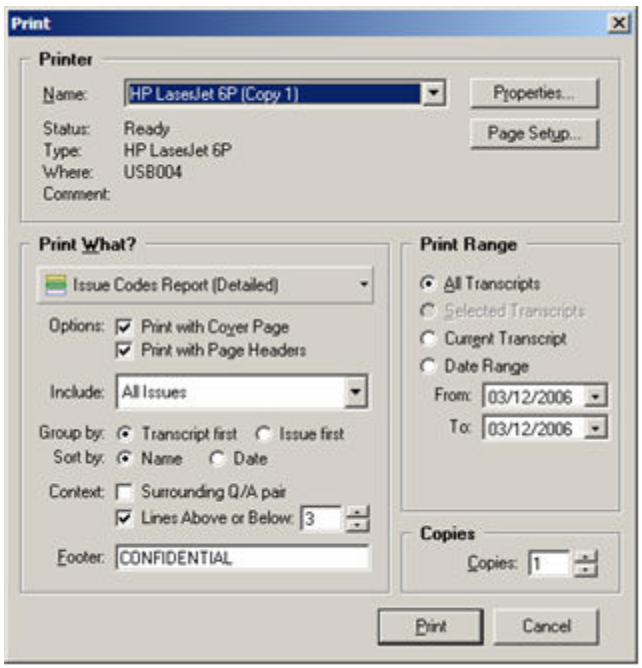

TrialDirector Suite Demo Case 5.0 (CD)
Barthel, Edwin (Vol. 01) - 01/24/2002
ASCII Transcript for Barthel, Edw
Audio/Video Part 01 for Barthel, E
Clip EB-0124-0000724 [Do you re
Full Clip (Beginning at p7:24)
Page 7:24 to 8:06
Exhibits
Issue Codes and Annotations
Consequential Damages
Page 8:15 to 8:18
Page 8:20 to 9:6
Page 9:7 to 9:7
Contributory Negligence
Page 8:6 to 8:10
Page 8:6 to 8:10
Page 8:20 to 9:6
Punitive Damages
Page 9:7 to 9:7
Virtual Clip EB-0124 [Virtual clip fc
Bell, Randall (Vol. 01) - 02/27/2002
Cormack, William T. (Vol. 02) - 03/13/2
DeLoreto, John R. (Vol. 01) - 02/07/20
Franc, Peter J. (Vol. 01) - 03/10/1999
Poll, Michael (Vol. 01) - 07/21/1995
Poll, Michael (Vol. 01) - 07/21/1995
Vinckier, Thomas A., RG. (Vol. 01) - 0
00008:01 Harz family's claim?
02 A. No, sir, I don't.
03 Q. And as you sit here today, you have no
04 recollection of what caused the contamination at
05 the property?
06 A. No, sir.
07 Q. Was one of the things you tried to
08 determine as part of your investigation the date of
09 loss?
10 A. Yes.
11 Q. What do you understand "date of loss" to
12 mean?
13 A. The date that the accident actually
14 occurred, as opposed to something that occurs over
15 a long period of time.
16 Q. Do you recall if you investigated the date
17 of loss in the Harz matter?
18 A. I couldn't tell you. I couldn't remember.
19 Q. And does seeing Exhibit 3 or Exhibit 15,
20 seeing the date of loss shown as November 1,
21 1989 -- on Exhibit 15 it says "administrative
22 only," and on Exhibit 3 it says "A/O."
23 Do you know what "administrative only"
24 means next to the date of loss?
25 A. No, sir, I don't.
00009:01 Q. Mr. Barthel, if you could turn to
02 Exhibit 14 in the binder in front of you, and I'll
03 take Exhibit 3 so you have a little less paper in
04 front of you.
05 Do you recall whether you ever saw
06 Exhibit 14, Mr. Barthel?
07 A. No, sir, I have no recollection.
08 Q. No recollection one way or the other?
09 A. No.
10 Q. And will you read the letter attached as
11 Exhibit 14. Take a minute to do that.

Printing Issue Code Reports

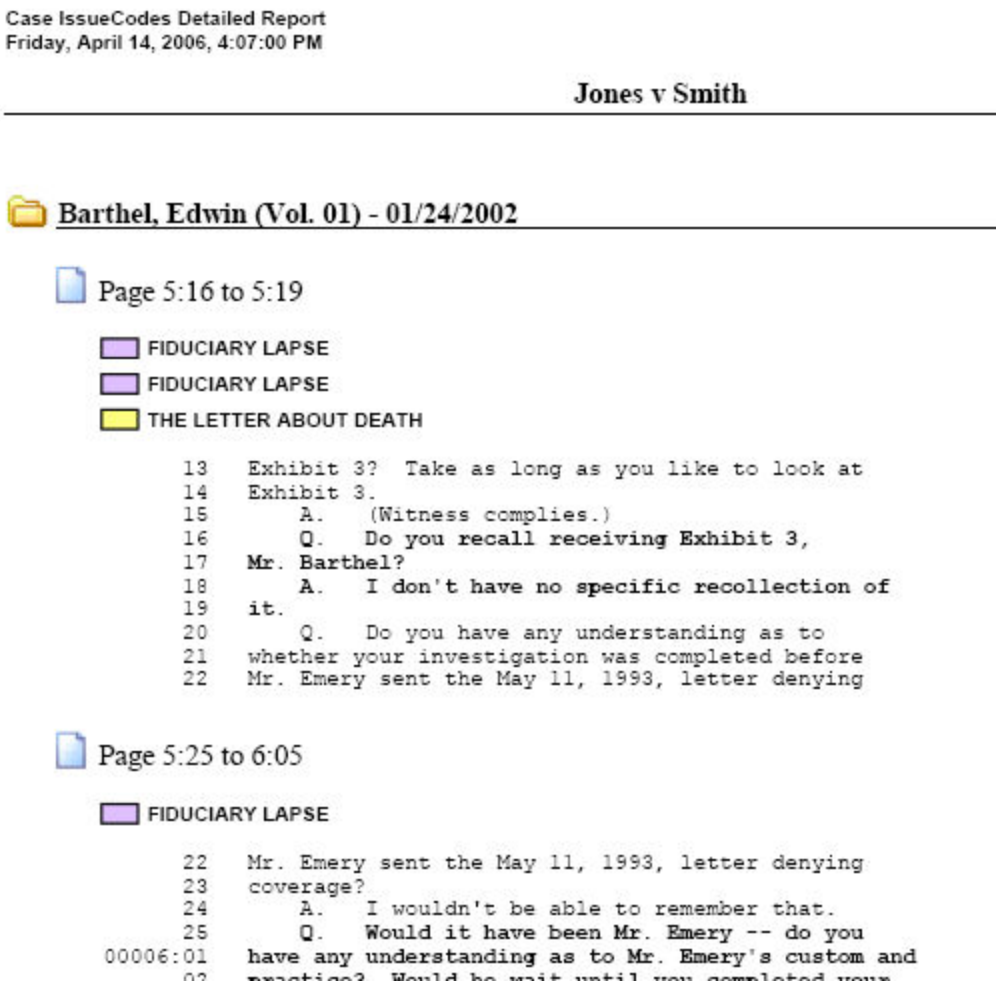
1. From anywhere in TrialDirector, open the **File** menu and select **Print**.
2. Under **Print What?**, click on the drop-down arrow and select **Issue Codes Report (Detailed)**.



3. Customize the Issue Codes Report using any of several settings. Group by transcript name or by issue. Include all issues or only selected issues. Display the related Q&A pair or only a selected number of lines. Print the issues for all transcripts, the current transcript, selected transcripts or transcript within a specified date range.



4. Click **Print**. The report is compiled and printed by TrialDirector. Depending on the selections you made in the Print dialog, your issue report may look like the following example:



Case IssueCodes Detailed Report
Friday, April 14, 2006, 4:07:00 PM

Jones v Smith

Barthel, Edwin (Vol. 01) - 01/24/2002

Page 5:16 to 5:19

FIDUCIARY LAPSE
FIDUCIARY LAPSE
THE LETTER ABOUT DEATH

13 Exhibit 3? Take as long as you like to look at
14 Exhibit 3.
15 A. (Witness complies.)
16 Q. Do you recall receiving Exhibit 3,
17 Mr. Barthel?
18 A. I don't have no specific recollection of
19 it.
20 Q. Do you have any understanding as to
21 whether your investigation was completed before
22 Mr. Emery sent the May 11, 1993, letter denying

Page 5:25 to 6:05

FIDUCIARY LAPSE

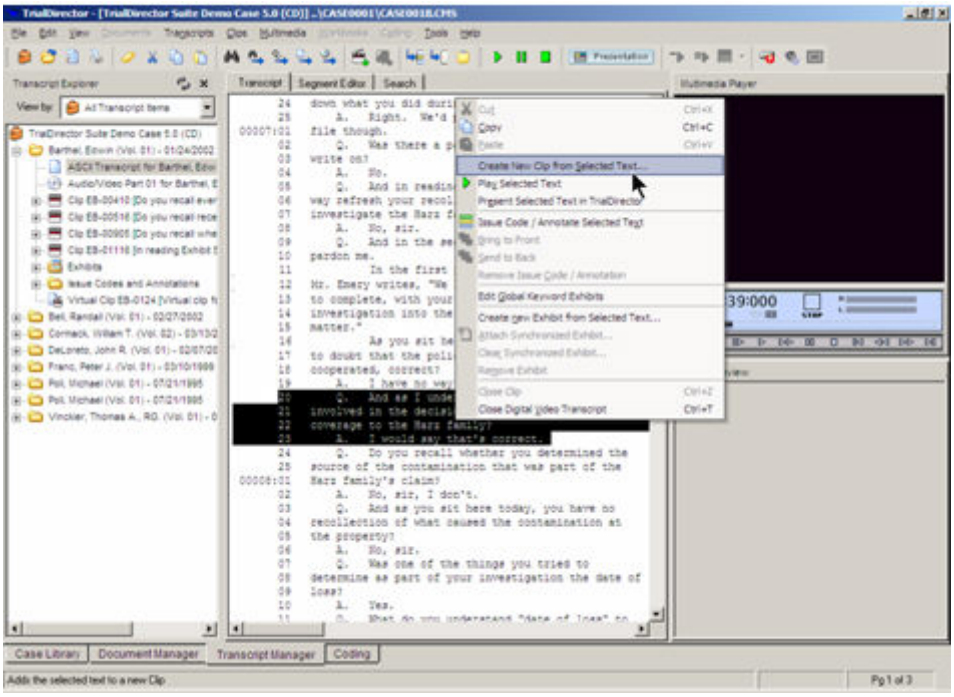
22 Mr. Emery sent the May 11, 1993, letter denying
23 coverage?
24 A. I wouldn't be able to remember that.
25 Q. Would it have been Mr. Emery -- do you
00006:01 have any understanding as to Mr. Emery's custom and

Working with Video Clips

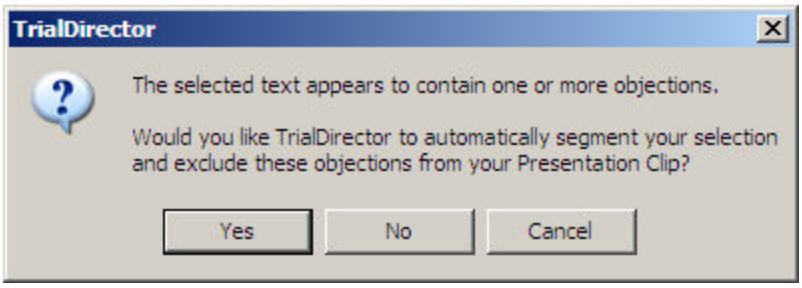
Creating a video clip is easy in TrialDirector. A video clip consists of one or more segments taken from a digital video transcript. By combining several segments into a single clip, you can play relevant testimony without interruptions such as long pauses, objections or irrelevant testimony. In this section, we'll show you how to create a video clip using one method. TrialDirector gives you the flexibility to create clips using a variety of other methods as well. Refer to the Help File for more information on creating and managing clips.

Creating a Video Clip with Multiple Segments

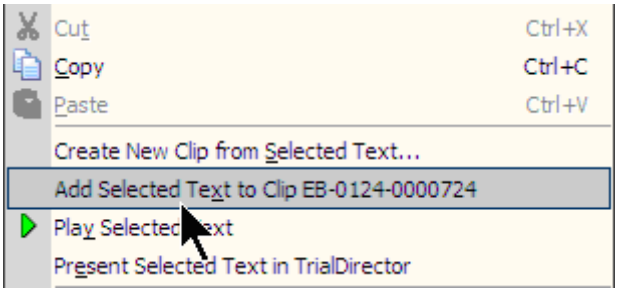
1. Select the Transcript Manager tab on TrialDirector's desktop.
2. Either open the ASCII transcript for a particular deponent or run a search as described earlier in this Quick Start Guide. If the transcript is linked to synchronized video, the video will appear in the Multimedia Player in the upper right corner of the Transcript Manager.
3. Locate the lines of text you want to capture in the clip. Highlight the lines, right-click and select **Create New Clip from Selected Text…**.



4. If the highlighting covers objections in the testimony, you will see the following dialog, giving you the opportunity to edit the clip so that only pertinent testimony is played:


TrialDirector
The selected text appears to contain one or more objections.
Would you like TrialDirector to automatically segment your selection and exclude these objections from your Presentation Clip?
Yes
No
Cancel

5. Move to the next segment you want to add to the clip. Highlight the segment, right-click, and select **Add Selected Text to Clip [clip identifier]**.



6. To create a new clip rather than a segment, select **Create New Clip from Selected Text...**.

   Practice Tip: *In Presentation mode, you can move from clip to clip easily. You may want to be conservative when adding segments to clips so that you may easily exclude a piece of testimony should it not be necessary to play it or should opposing counsel object to its use at trial. Remember: A clip plays all segments successively as one continuous chain.*

All clips are displayed in the Transcript Manager and within the Transcripts section of the Case Library, organized according to deponent or witness. You can drag and drop clips into a Workbook when organizing your evidence or preparing for trial.

Adding Annotations to Images

TrialDirector offers a variety of helpful tools to use for marking up images. You may choose to apply annotations (also referred to as "markups") before you ever get to the courtroom; this is referred to as "pre-treating" the images. You may also choose to wait until you present images in the courtroom and mark them up in real time. Or you may use a combination of these techniques to create an effective trial presentation.

The annotations that can be added to the images in your case are:

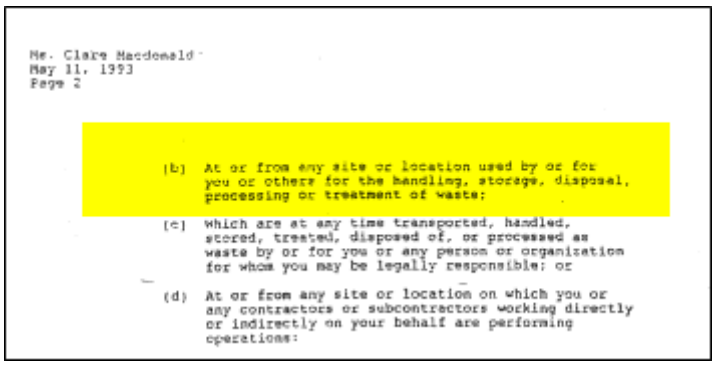
- Highlighting (in multiple colors)
- Redactions
- Arrows (in multiple colors and widths)
- Text
- Lines (in multiple colors and widths)
- Sticky Notes
- Boxes (in multiple colors and widths)
- Hot spots
- Circles (in multiple colors and widths)
- Stamps (which can be customized)
- Free-hand drawing
- Exhibit stamps

1. Click on the tool on the toolbar OR select **Show Image Annotation Toolbar** from the **Documents** menu. The annotation toolbar is displayed on the desktop.

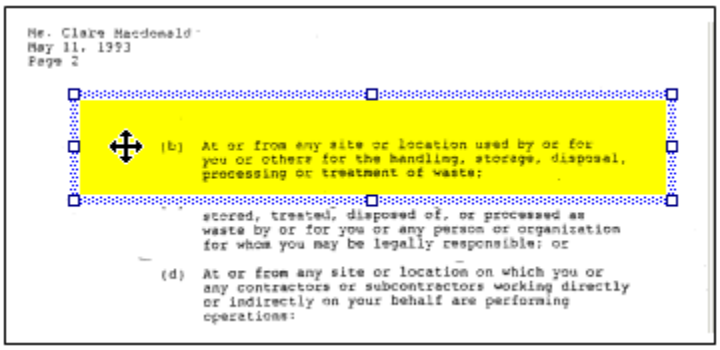
2. Select the annotation tool you wish to use. Then, if applicable, select the color of the tool from the color bar.

3. Draw the annotation on the image.

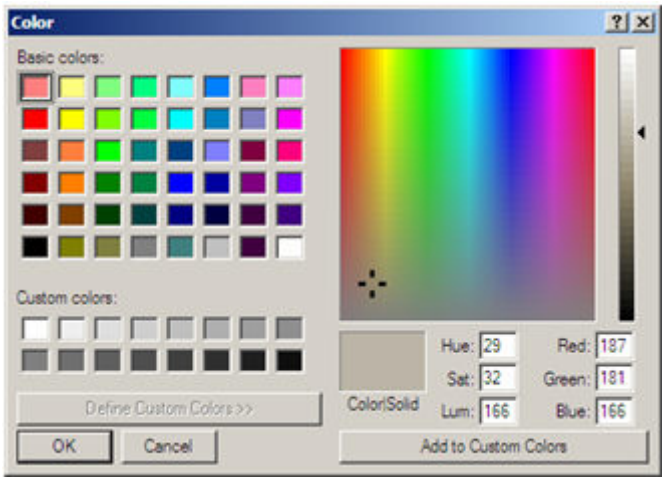
- When you create the annotation, it appears on the page as shown below. (The following was created using the Highlight tool, with the color set to yellow.)


Mr. Clare Macdonald
May 11, 1993
Page 2
(b) At or from any site or location used by or for you or others for the handling, storage, disposal, processing or treatment of waste;
(c) which are at any time transported, handled, stored, treated, disposed of, or processed as waste by or for you or any person or organization for whom you may be legally responsible; or
(d) At or from any site or location on which you or any contractors or subcontractors working directly or indirectly on your behalf are performing operations:

- To delete or move the annotation, click on the tool on the toolbar, then click on the annotation. Notice the outline around the annotation. When you see this outline, your mouse pointer will appear as a . At this point, you may move the annotation or delete it by clicking on the **Delete** key on your keyboard OR by right-clicking on the selected annotation and selecting **Delete** from the shortcut menu.


Mr. Clare Macdonald
May 11, 1993
Page 2
(b) At or from any site or location used by or for you or others for the handling, storage, disposal, processing or treatment of waste;
stored, treated, disposed of, or processed as waste by or for you or any person or organization for whom you may be legally responsible; or
(d) At or from any site or location on which you or any contractors or subcontractors working directly or indirectly on your behalf are performing operations:

- To change the color of the annotation, select it (as shown above) and right-click on the annotation. Select Set Background Color, and the following dialog box opens. Choose the color you wish to use and click **OK**.

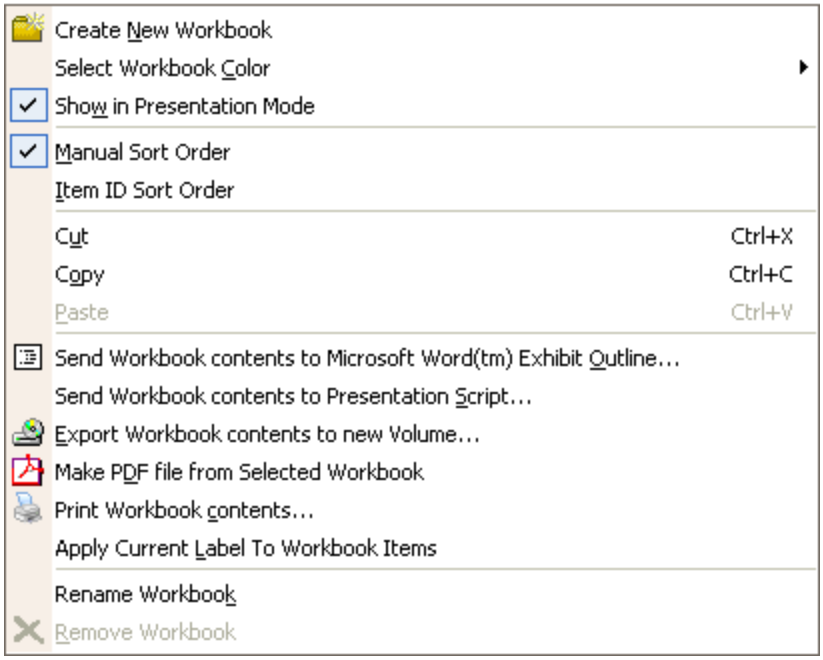


Organizing Exhibits Using Workbooks

The Workbooks Explorer is a convenient and flexible way to organize and work with the exhibits in your case. When you first create a case, three workbooks are created for you: Search Results, Trial Exhibits and Witnesses. You can create additional workbooks as needed for case. Use workbooks to select groups of items for printing, to create exhibit outlines (see below), to display exhibits at trial, and to easily create a PDF file of the images in the workbook, among other things.

Creating a New Workbook

1. If you want to create a workbook at the main workbook level, click on **Workbooks** at the top of the Workbook menu. To create a new workbook as a subset to an existing workbook, click on the desired workbook and the new workbook will be created under the selected workbook.
2. To create a new workbook, click on the tool on the toolbar or right-click anywhere in the Workbook Explorer window and select **Create New Workbook**.



3. You can set several characteristics for any workbook from the Workbook shortcut menu:

    - To change the color of the Workbook, select **Select Workbook Color** from the menu.
    - Workbooks can be used for easy access to your exhibits in presentation mode. If you want the newly created workbook to be available to you in presentation mode, make sure the **Show in Presentation Mode** option is selected.
    - You can sort the items within any individual workbook in two ways: by item ID number or manually.

Adding Items to Workbooks

- To add an item to a workbook, simply drag and drop it from the Case Library.
- To select multiple items in the Case Library to add to a workbook, hold the CTRL button down as you click on the items.
- To select multiple adjacent items, hold the SHIFT button down, click on the first item in the group, then click on the last item in the group.

TIP: *Continue to hold down the CTRL or SHIFT button as you drag the items to the Workbook Explorer and drop them on the desired workbook.*

Creating an Exhibit Outline

An Exhibit Outline is a printed summary of the contents of a workbook. The exhibit outline displays the item ID and notes, an image of the item, and a barcode that represents the item. The barcodes can be used to quickly display the item during trail. Exhibit outlines are exported to a Microsoft Word format.

1. Right-click on the workbook from which you want to develop an Exhibit Outline.
2. Choose **Send Workbook contents to Microsoft Word ™ Exhibit Outline** from the shortcut menu.

3. The Exhibits Outline can be edited using Word.

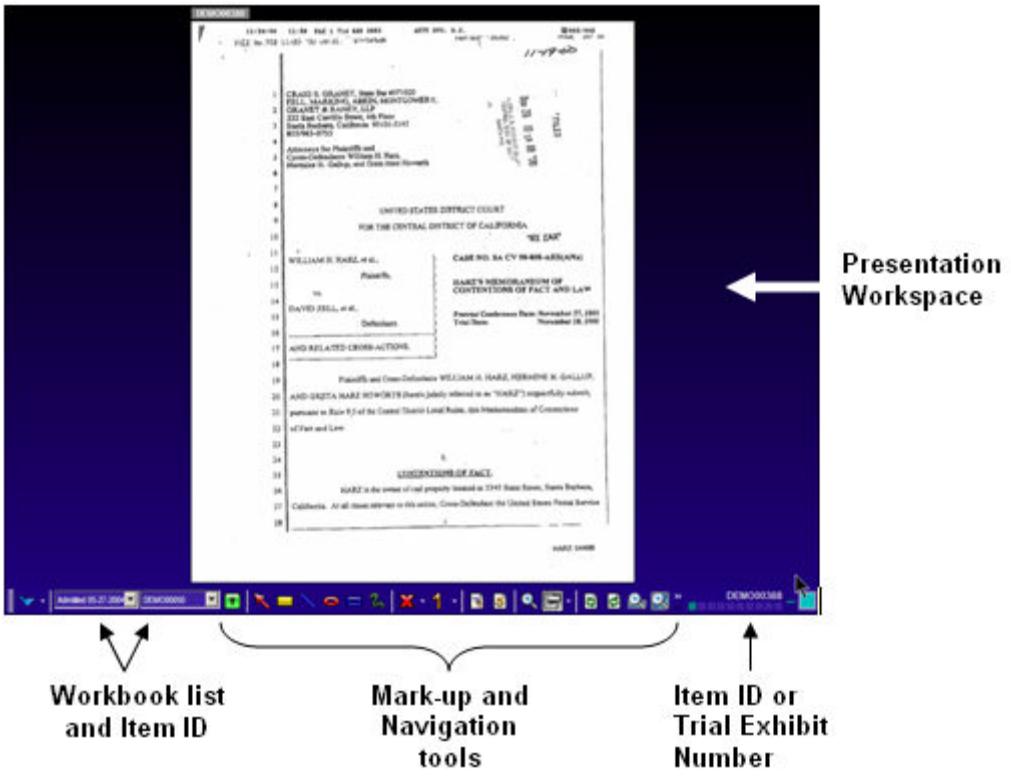
Presenting at Trial

As an experienced litigator, you know that two of the keys to effectively telling your case's story in the courtroom are organization and the ability to respond quickly to changing events. TrialDirector helps you with both.

TrialDirector's Presentation mode starts with a blank screen and a toolbar along the bottom of the blank screen. (TrialDirector can be set so that the presentation mode automatically displays the currently selected item in the Document Manager screen.) Your exhibits are displayed on the screen without the interference of menus or other "noise" on the screen to distract jurors. The toolbar can be customized to suit your presentation style, and, if you wish, it can be hidden completely until you are ready to use it. Retrieving exhibits in Presentation mode can be accomplished in a number of ways: entering the Item ID number, entering the Trial Exhibit No. (as it appears in the Document Manager screen), using a bar code reader, or using Workbooks.

Retrieving an Exhibit Using Item ID or Trial Exhibit Numbers

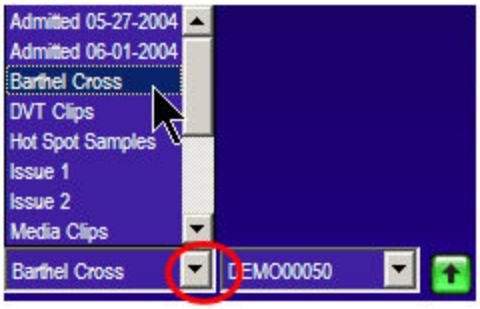
1. Click on the Presentation tool on TrialDirector's toolbar.
2. When the Presentation mode opens, simply type the Item ID number or the Trial Exhibit Number (assigned in the Document Manager or Coding tabs), then hit the Enter key.



Retrieving an Exhibit Using Workbooks

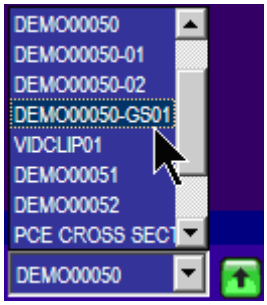
1. Click on the drop-down arrow next to the Workbook List to pop up a list of all of your displayed workbooks.

- When you added new workbooks, you had the option not to display the workbook in presentation mode. If you did not change that option, the workbooks will appear in this list.



2. Select the workbook you want to work with. The item ID for the first item in the workbook is displayed.

3. To present the displayed item ID, click the next to the item ID. To move to the next sequential item in the workbook, click the again.
    - To display another item ID in the same workbook, click the to the right of the displayed item ID, select the correct item ID from the list, and click the .



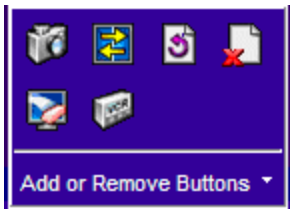
4. The item ID for the next item in the workbook now appears on the workbook toolbar. When you are ready to display that item, click the . The selected item is displayed.

Adding mark-ups in Presentation Mode

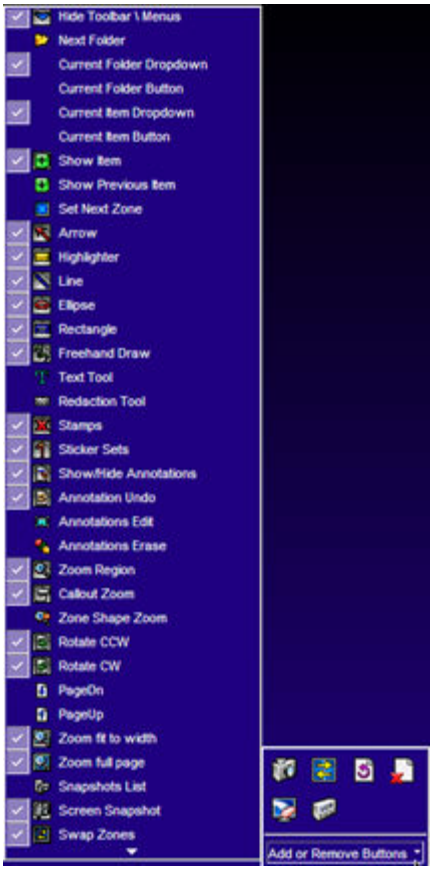
TrialDirector includes an extensive number of tools to use in Presentation mode in order to enhance your presentation of evidence. The Presentation Toolbar can be customized and each customized toolbar can be saved.

When you hover the mouse pointer over one of the tools, a description of the tool's function appears on the right side of the Presentation Toolbar.

To view additional tools that are not immediately displayed on this list, click . An expanded toolbar is displayed.



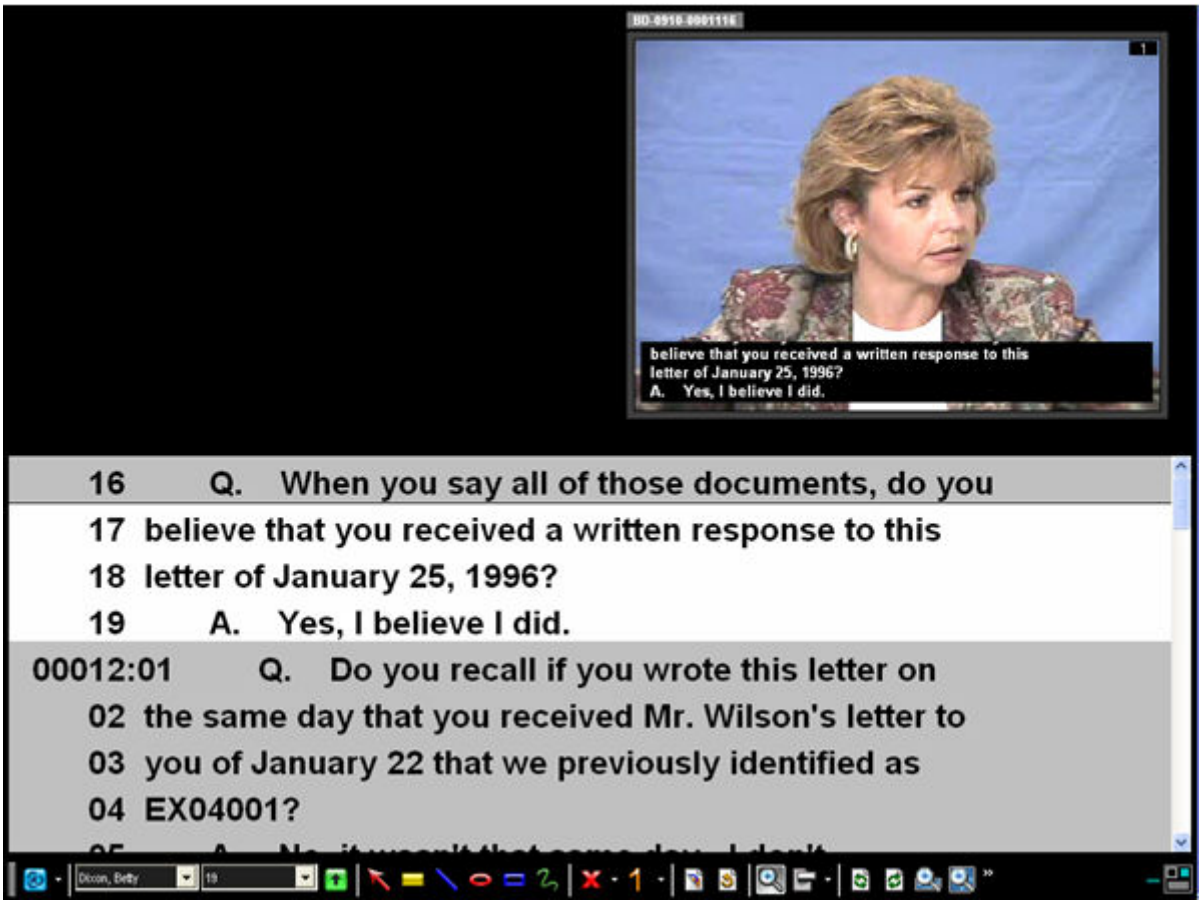
To add and remove tools on the Presentation Toolbar, select **Add or Remove Buttons** on the expanded toolbar. A checkmark adjacent to a listed tool indicates that tool current appears on the Presentation Toolbar. Click on a checkmark to clear it. Click next to a tool that does not have a checkmark, and that tool will be displayed on the toolbar.



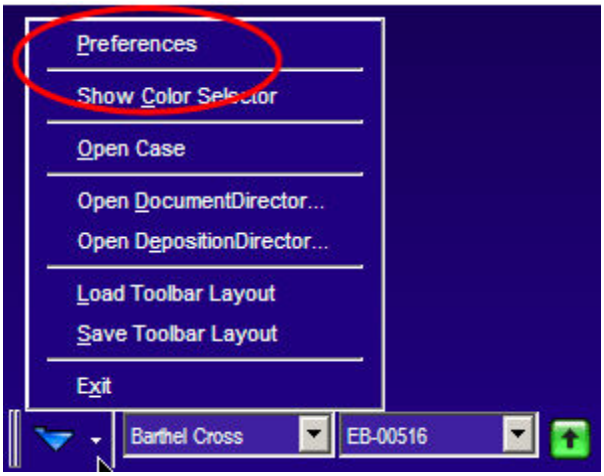
Displaying Video Clips

1. In presentation mode, select the workbook that contains the clip(s) you want to play.
   - You can also enter the item ID number for the clip just as you can with documents and other items in your case.

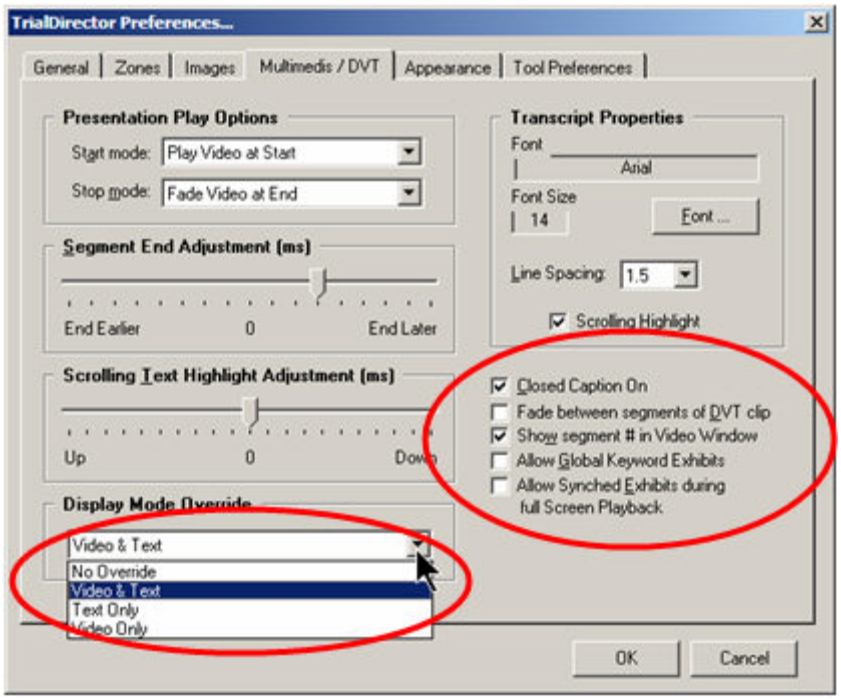
2. When you click the to display the workbook item, the clip plays on the presentation workspace.


believe that you received a written response to this
letter of January 25, 1996?
A. Yes, I believe I did.
16 Q. When you say all of those documents, do you
17 believe that you received a written response to this
18 letter of January 25, 1996?
19 A. Yes, I believe I did.
00012:01 Q. Do you recall if you wrote this letter on
02 the same day that you received Mr. Wilson's letter to
03 you of January 22 that we previously identified as
04 EX04001?

3. Adjust the settings for presenting video clips by modifying the presentation options. To access preferences, click on the pull-down arrow adjacent to the inData logo button on the presentation toolbar. Select **Preferences**. Alternatively, from the Case Library, open the **View** menu and select **Presentation Options...**.



4. In the Preferences dialog, select the Multimedia/DVT tab.



You're on your way…

This guide was intended to help you become accustomed to some of the popular features in TrialDirector, but many more features exist. When you are comfortable with the basics, you'll want to look into other topics in the Help file such as:

- Working with Zones in presentation mode to enable side-by-side comparisons of documents
- Editing video clips to revise starts and stops to exactly where you need them
- Printing condensed transcripts (4-pages of transcript to a single printed page)
- And much more….

More Information:

- What's New?
-

Application Integration

Application Integration

TrialDirector integrates with a number of third-party applications, creating even more powerful tools to move case data from discovery to trial. Listed below are the third-party applications that TrialDirector integrates with. Included is a brief description of how TrialDirector integrates with each particular application.

CT Summation iBlaze	CT Summation iBlaze has a single, simple uniform user interface for searching and sorting disparate pieces of information. iBlaze combines transcript management, remote and local document retrieval, and an interactive deposition tool, into one integrated program.
LiveNote	TrialDirector and LiveNote users can transfer LiveNote annotations into TrialDirector and perform all the editing features provided within Transcript Manager.
Concordance	Concordance users can integrate Document Manager as their default image viewer. Simply configure your Concordance case to call the TrialDirector CPL to create the link. Utilizing DDE technology, TrialDirector will display the associated image from the Concordance case. Also, Concordance users can export their coding database for import into TrialDirector's Coding Module.
iCONECT	iCONECT users can search several online coding fields to find specific documents. The query results can then be directly sent to TrialDirector. The image files associated with the iCONECT documents are downloaded to your system and automatically added to the TrialDirector case. This provides an easy to use, stable integration between your document repository and trial presentation software.
Microsoft PowerPoint	TrialDirector seamlessly integrates with Microsoft PowerPoint. Using one ActiveX control, a fully functional TrialDirector session can be embedded within a PowerPoint slide. Users can design the appearance of the TrialDirector presentation screen when embedding the control within the PowerPoint slide. The PowerPoint slide can be saved with the images, clips or videos pre-arranged the way you want. When presenting the slide show, the TrialDirector items appear just the way you saved them and are immediately displayed.

Microsoft Access	TrialDirector and Microsoft Access use DDE technology to create a fully functional integration. Many organizations utilize Access databases to store case information, such as document IDs, descriptions, and notes. DDE commands can be added to Access database forms to send the current page ID to the Document Manager, which will display the corresponding image.
CaseSoft CaseMap	Using DDE technology, TrialDirector can be set as the default image viewer in CaseMap.

More Information:

- CT Summation Enterprise/iBlaze
- Concordance
- LiveNote
- iCONECT
- Microsoft PowerPoint
- Microsoft Access
- CaseMap

Concordance

Application Integration - Concordance Integration

TrialDirector has a tightly integrated connection with Concordance. Concordance users can integrate TrialDirector's Document Manager as their default image viewer. Concordance cases are configured to call the Document Manager CPL to create the link. Using DDE technology, Document Manager will display the associated image from the Concordance case. Also, Concordance users can export their coding database for import into TrialDirector's Coding Module.

More Information:

- Establishing Link
- Displaying Concordance Document Images With TrialDirector
- Exporting Concordance Coding Database into TrialDirector

Displaying Concordance Document Images With TrialDirector

To view the associated document image in TrialDirector, use one of the 3 methods listed below:

- Simply click on the either the Concordance table record, the associated image will appear in TrialDirector.
- Use the **[Next]** and **[Previous]** navigation buttons on the bottom toolbar in Concordance.
- Use the **[Ctrl] + [C]** keystroke to copy the Concordance PRODNO item to the clipboard. TrialDirector will intercept the clipboard text and display the associated image.

Note *For additional information about DDE linking with Concordance look in your Concordance Users Manual under "Configuring Image Viewers."*

More Information:

- Establishing Link
- Display Concordance Images
- Export Concordance Coding Database

Concordance Integration - Establishing Link

In order to establish the link between Concordance and TrialDirector, follow the instructions below:

1. Copy the trialdirector5.cpl file in the ***\support\dde\concordance*** directory of the TrialDirector CD into either the TrialDirector or Concordance application directory.
2. Next, the Concordance database settings need to be updated in order to effectively link to TrialDirector. First, open the .INI file contained within the Concordance database folder. For example, the *Sample* Concordance case database is located at the **C:\Program Files\Concordance\Database** directory. Within the case database directory there should be an .INI file of the same name as the case. (ex. *sample.ini*)
3. Open the .INI file with Notepad and establish the following ViewerCPL line under the [Settings] section.

[Settings]
ViewerCPL=C:\Program Files\Concordance\trialdirector5.cpl

Note: *"Program Files" and "Concordance" simply represent the true path to the trialdirector5.cpl file.*

Note: *Create the [Settings] section, if it does not exist within the *.ini file.*

4. Go to the **Tools** menu in Concordance and open the **Preferences** dialog. Select the Viewer tab and set the viewer executable and the location of the CPL file.
5. After this step has been completed, open the Concordance database that you are working with. Look for a field labeled "BEGNO". If the document bates number field within the Concordance database you are using is different than "BEGNO", simply open the trialdirector5.cpl file with Notepad and replace "BEGNO" with the appropriate setting. This field must reference your beginning document bates number (the image ID field in the browse list within TrialDirector.
6. Open your Concordance database, and click the "Camera" icon on the bottom toolbar of the Concordance screen, as shown below.

TrialDirector will launch and open the last opened case. Open the TrialDirector case that contains the same Document IDs as the Concordance database. Create a new TrialDirector case to add the Document IDs and images to match Concordance, if necessary.

Note: *The Document ID contained in the Concordance BEGNO field must match the TrialDirector ID field in order for the associated image to display.*

Note: *For your convenience a sample Concordance database file (*.dcb) and corresponding database *.ini file are provided within the CPL download package. Use these files with the TrialDirector Suite Demo Case. Open the sample Concordance database file*

*and the TrialDirector case above to test the connection. The ViewerCPL line, within the *.ini file, reflects the default TrialDirector application directory.*

More Information:

- Establishing Link
- Display Concordance Images
- Export Concordance Coding Database

Exporting Concordance Coding Database into TrialDirector

Topics

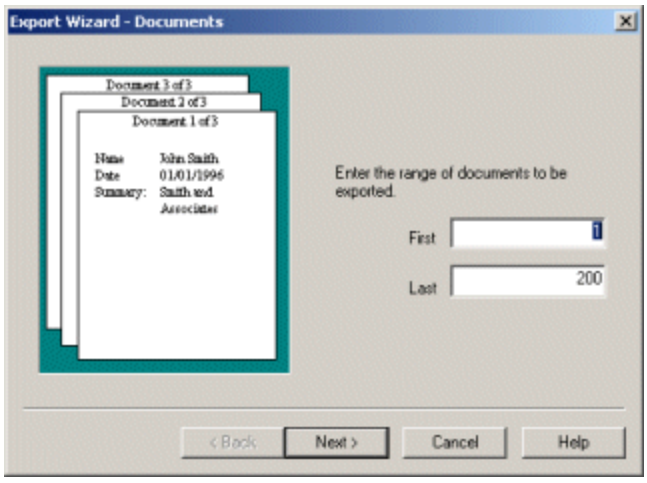
- Export Coding Text from Concordance
- Import Coding Text into TrialDirector

Export Coding Data From Concordance

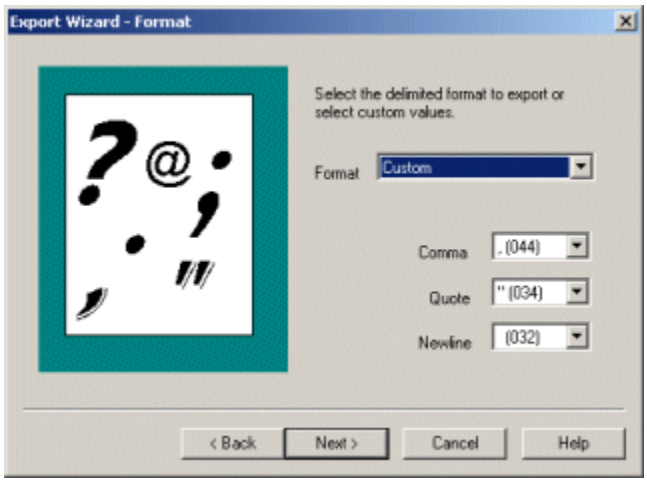
Concordance can export coded documents as delimited ASCII text. Use Concordance's Document Export Wizard to properly export the coding information. Follow the directions below to export coding information from Concordance:

1. Click on the **Documents** menu in Concordance and select **Export**, then **Delimited Text**. The following screen will appear:

2. Select the **Export Wizard** option and click **[OK]** to continue. The following dialog will appear:



3. Select the range of documents you wish to export and click **[Next]** to continue. The following screen will appear:

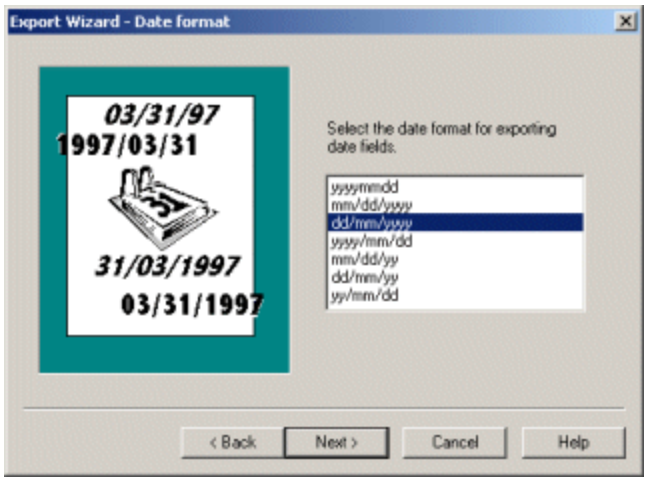


4. Select the **[Custom]** format from the drop-down list. Use the following ASCII characters to ensure proper formatting of the fields within the delimited file:

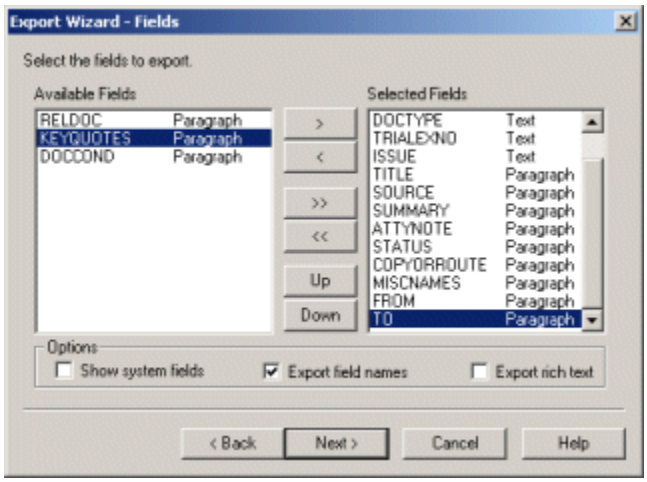
   - **Comma = , (044)**
   - **Quote = " (034)**
   - **New line = (032)**

Note: *Using the default ASCII character code of (013) will wrap text from long Attorneys Notes fields into the PRODNO field. This will cause note text to be misinterpreted as a Document ID during the TrialDirector coding import. Using ASCII character code (032), which is a space, will resolve the problem.*

5. Click **[Next]** to continue. The following screen will appear:

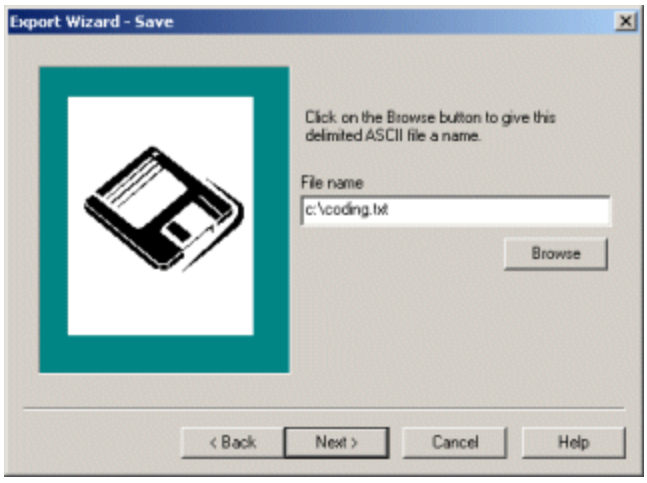


6. Select the desired date field format and click **[Next]** to continue. The following screen will appear:



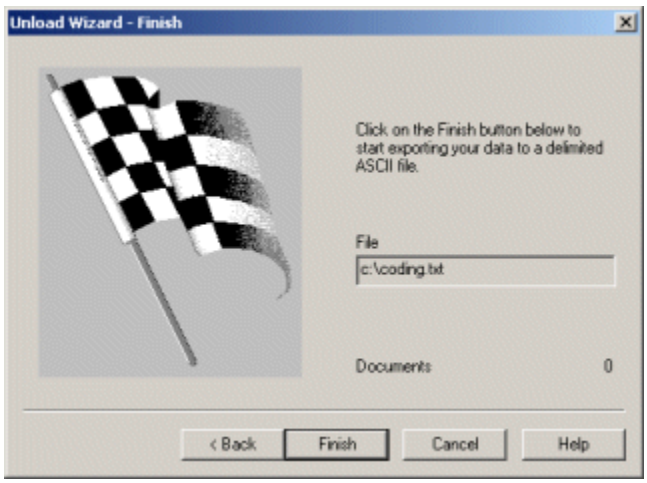
Note: *The selected field names are read by the TrialDirector during the coding file import. The Concordance field names are mapped to the corresponding TrialDirector fields. See the link at the bottom of this page to learn more about importing a coding file.*

7. Move the fields you wish to export into the **Selected Fields** list. Make sure the **Export Field Names** option is checked within the Option section of this dialog. It is not necessary to select the other export options. Click **[Next]** to continue. The screen below will appear:



8. Type in a path and file name of the delimited ASCII file that will be exported from Concordance, as shown above. Click **[Next]** to continue.

   The following screen will appear:



9. Click **[Finish]** to begin exporting the Concordance data to a delimited ASCII file. The coding file is now ready for import into TrialDirector.

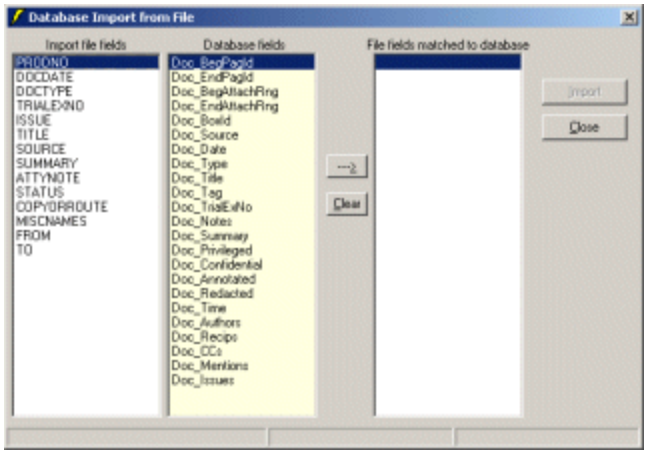
More Information:

- Establishing Link
- Display Concordance Images
- Export Concordance Coding Database

Import Coding Data From Concordance

Concordance has the ability to export coded documents as delimited ASCII text. Once coding data has been exported via Concordance's Export Wizard, it can be imported into TrialDirector. Follow the directions below to import coding information into TrialDirector:

1. Click on the **Coding** menu in TrialDirector and select **Import Coding Data**. TrialDirector will prompt you to browse to the comma delimited file to import. Select the file to import and click **[Open]** to proceed. The following screen will appear:



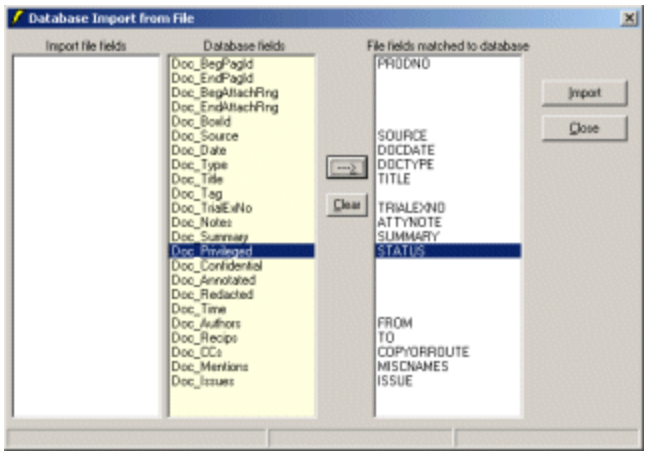
TrialDirector Coding Import Dialog: You do not have to import all of the file fields from the Concordance file.

Note: *The Import File Fields displayed during import depend upon the fields exported from the Concordance database.*

2. TrialDirector will read the first record of the Concordance input file to determine the **Import File Fields**. These fields are listed in the left side column in the screen above. The available **Database Fields** are listed in the center column. Finally, the **File Fields Matched to the Database** are listed on the right column. The user needs to match or map the file fields from the import file to the available fields. To perform this task, perform the steps below:

   - Select the first Import File Field.
   - Find the appropriate field within the listed Database fields that most closely matches the Import File Field.
   - Click the arrow ---> button to move that field to the File Fields Match to Database column.
   - This action will cause the moved item to disappear from the Import File Fields column.
   - Repeat these steps until all the fields in the Import File Fields have been mapped. Any fields remaining will not be imported.

3. Once all of the fields have been mapped, the import dialog will look similar to the once below. Click **[Import]** to start the process. The import process time is determined by the amount of data included in the input file.



Note: *You do not have to map all of the file fields from the import file.*

During the import process, you will see a progress indicator. Any duplicate records will be indicated as well as the number of actual records processed.

4. Once the coding file has been imported, click **[Close]** on the import dialog to update the coding database and return to TrialDirector. Clicking on the **Coding** Item Type tab will display the newly added records.

More Information:

- Establishing Link
- Display Concordance Images
- Export Concordance Coding Database

iConect

Application Integration - iConect Integration

iCONECT is an Internet based document repository. iCONECT users can search several online coding fields to find specific documents. The query results can then be directly sent to

TrialDirector. The image files associated with the iCONECT documents are downloaded to your system and automatically added to the TrialDirector case.

This entire process occurs with just a few mouse clicks. Now there is an easy to use, stable integration between your document repository and your trial presentation software.

iCONECT and TrialDirector Integration Features

- Export iCONECT case images directly to TrialDirector
- Export current or selected documents, document queries, or entire iCONECT databases directly to TrialDirector
- Annotate images for trial presentation, after they are exported to TrialDirector.
- Export iCONECT coding data directly to TrialDirector

More Information:

- Establishing Link
- Using iCONECT with TrialDirector

Application Integration - iCONECT Integration - Establishing Link

TrialDirector has provided a single executable file that will automatically establish the link for iCONECT.

To establish the link between TrialDirector and iCONECT, run the *inMime5.exe* file, which is located in the path listed below:

C:\Program Files\Common Files\inData Shared\inMime5.exe

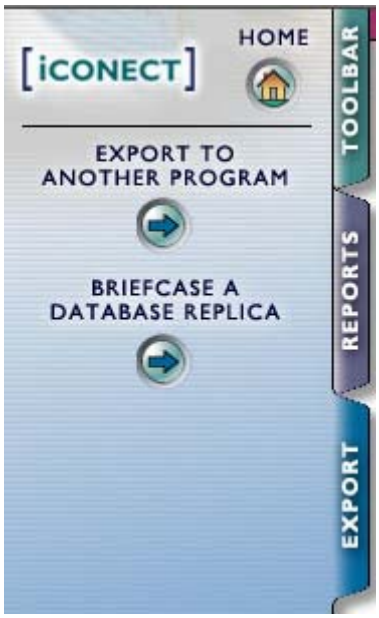
More Information:

- About iCONECT Integration
- Establishing Link
- Using iCONECT with TrialDirector

Application Integration - Using iCONECT with TrialDirector

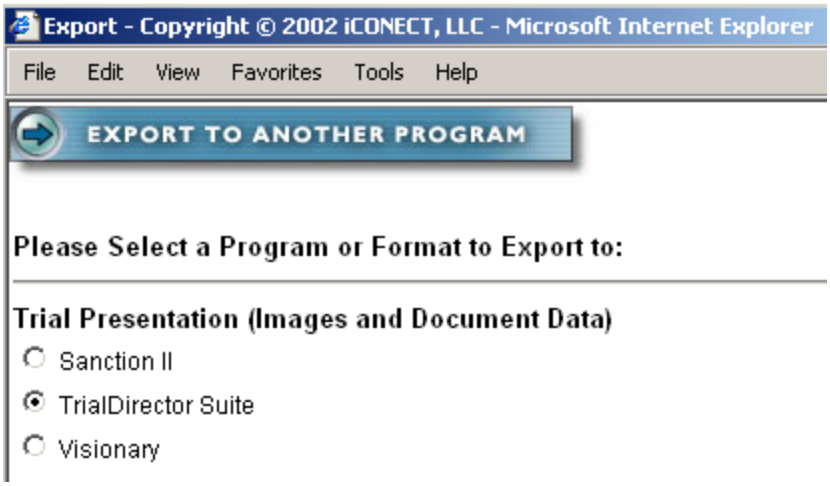
iCONECT users can add individual document images or a batch of images associated with a query to a TrialDirector case. Follow the steps below to add iCONECT images to TrialDirector:

1. Make sure that the connection has been established. Click the link at the bottom of the page for more information about establishing the link with iCONECT.
2. Log into iCONECT, choose a database from the Case Manager screen and begin working.
3. Perform searches and categorize database evidence as necessary to determine the documents you wish to export to TrialDirector.
4. Click on the blue iCONECT **Export** tab on the left side of the screen, under **Toolbar** and **Reports**.
5. On this blue tab, click the **[Export to Another Program]** button, as shown below.

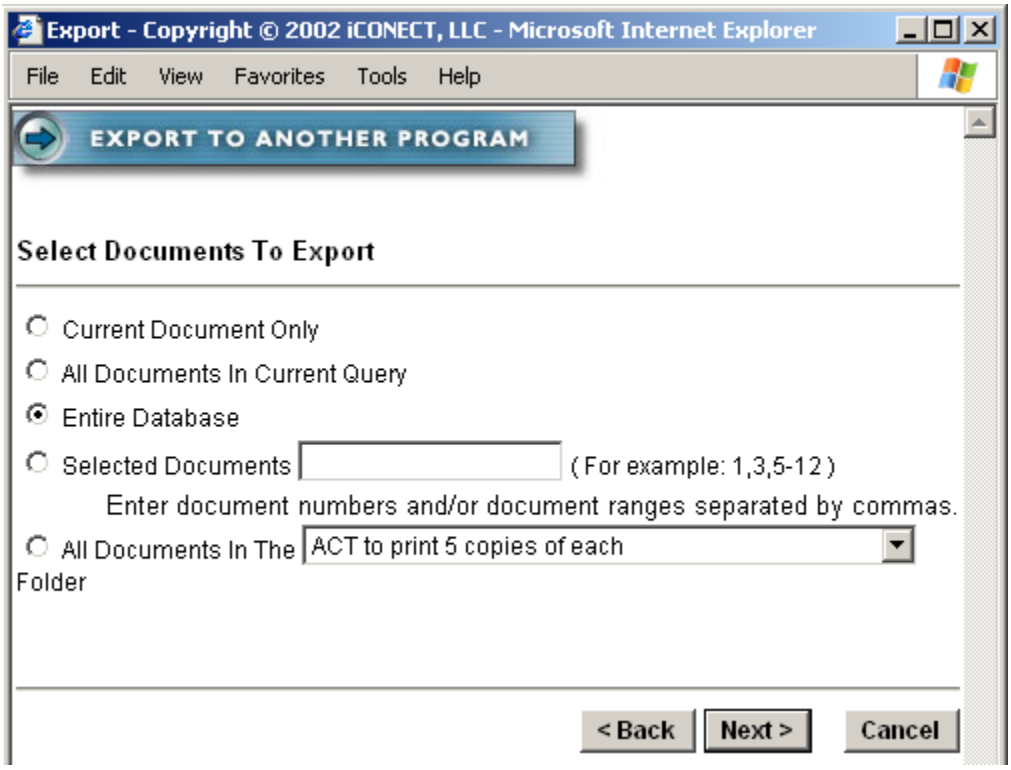


Note: *These instructions cover iCONECT version 3.5, which was released in November 2002.*

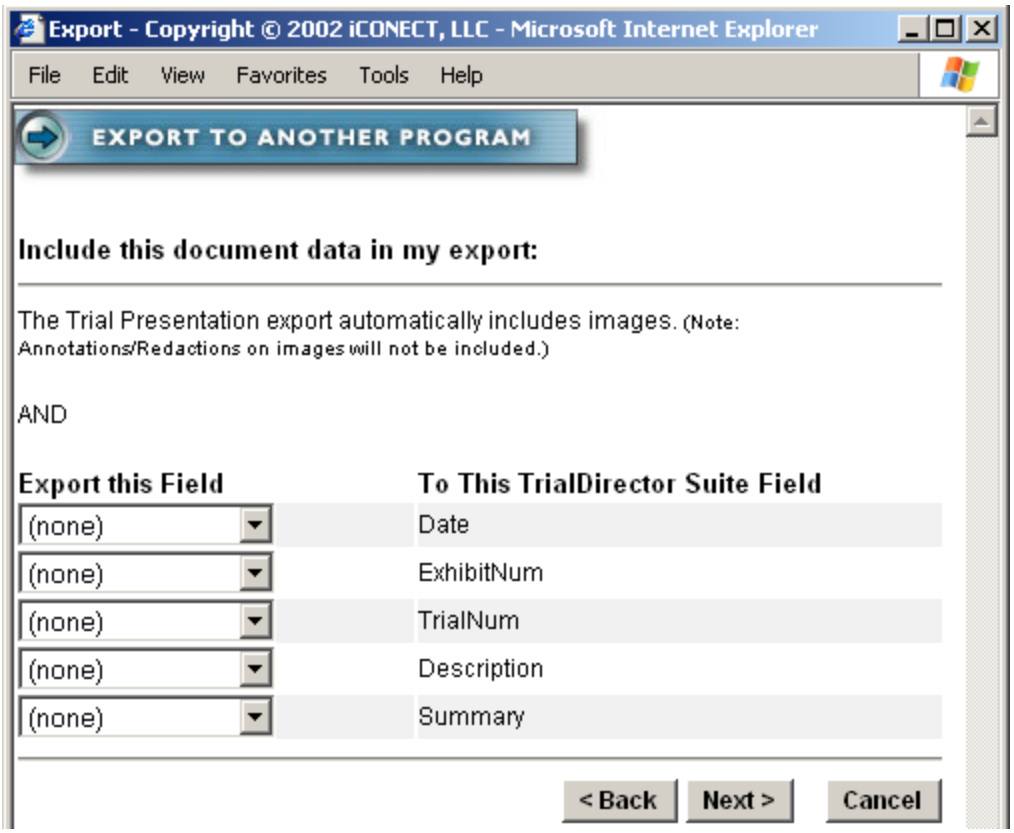
6. An Export screen will pop up, providing you with a list of programs that data can be exported to. Choose TrialDirector from the "Trial Presentation" category. Click **[Next]**. *If TrialDirector is not listed on this screen, please contact your iCONECT administrator to have it added.*


Export - Copyright © 2002 iCONECT, LLC - Microsoft Internet Explorer
File Edit View Favorites Tools Help
EXPORT TO ANOTHER PROGRAM
Please Select a Program or Format to Export to:
Trial Presentation (Images and Document Data)
Sanction II
TrialDirector Suite
Visionary

7. The next screen will ask you to choose the documents you wish to export. You can export just the current document, all documents resulting from the current search, the entire database or a range of documents. You can also select all the documents that have been placed in a specific folder. After you have made your selection, click **[Next]**.

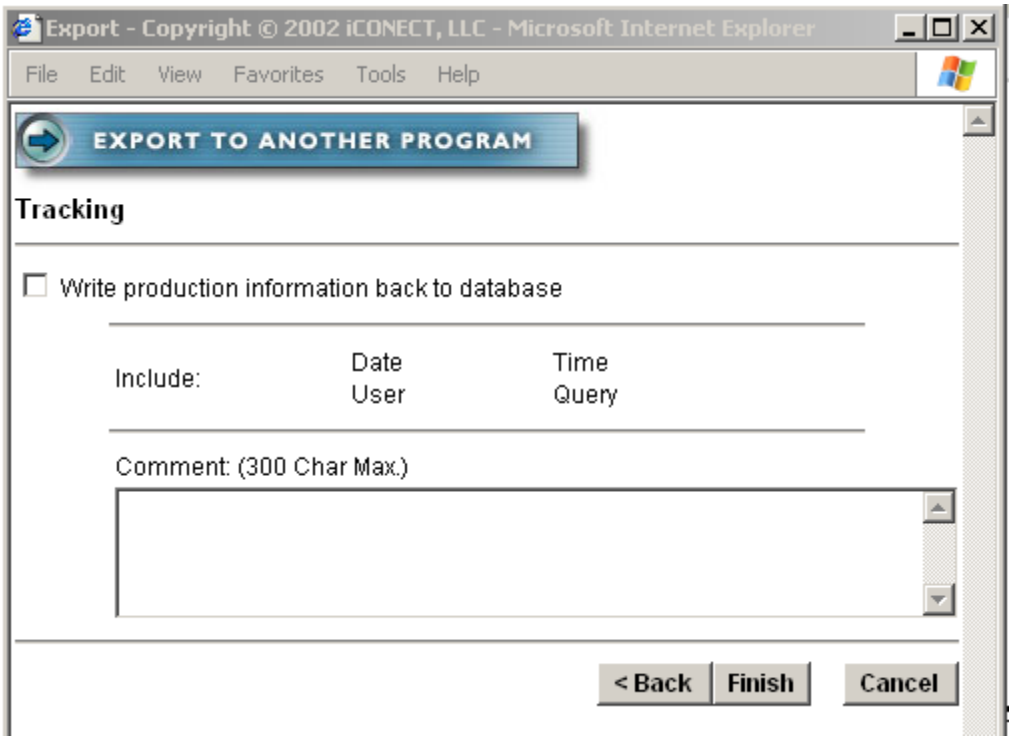

Export - Copyright © 2002 iCONECT, LLC - Microsoft Internet Explorer
File Edit View Favorites Tools Help
EXPORT TO ANOTHER PROGRAM
Select Documents To Export
Current Document Only
All Documents In Current Query
Entire Database
Selected Documents
(For example: 1,3,5-12)
Enter document numbers and/or document ranges separated by commas.
All Documents In The
ACT to print 5 copies of each
Folder
< Back
Next >
Cancel

8. You will next be asked to choose how your coded data will appear in TrialDirector's Document Manager module. **THIS PORTION OF THE EXPORT IS NOT YET IMPLEMENTED AND IS RESERVED FOR FUTURE USE.** Simply click **[Next]** to continue.

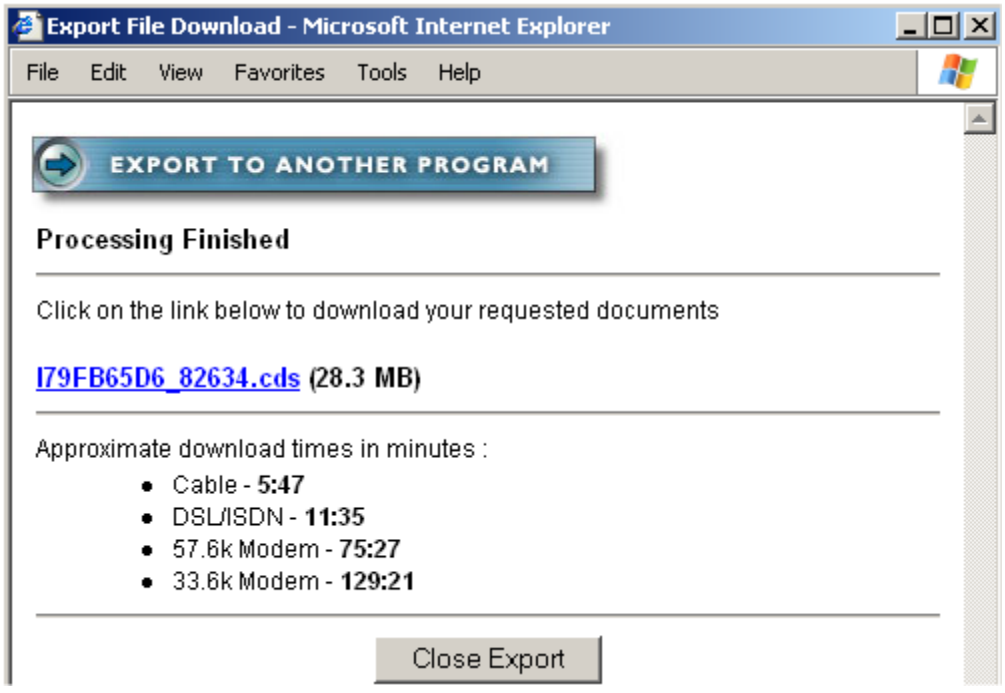


9. If your administrator has requested "export tracking", you will be asked to enter a short comment explaining why you are downloading these files to TrialDirector. The tracking screen will also record your username, time of export and other information. This screen may not appear. If it does not, skip this step.

Note: *The Write Production Information option may or may not appear, depending on your iCONECT admin settings.*



10. iCONECT will generate a TrialDirector "CDS" import file based on the criteria you have specified in the previous screens. Once your file has been generated, you will be presented with a blue hyperlink. iCONECT will also determine the approximate download time based on your connection. Click on the hyperlink to download your TrialDirector file. When asked by Windows to **[Open]** or **[Save]** the file, select **[Open]**.


Export File Download - Microsoft Internet Explorer
File Edit View Favorites Tools Help
EXPORT TO ANOTHER PROGRAM
Processing Finished
Click on the link below to download your requested documents
I79FB65D6_82634.cds (28.3 MB)
Approximate download times in minutes :
Cable - 5:47
DSL/ISDN - 11:35
57.6k Modem - 75:27
33.6k Modem - 129:21
Close Export

Note: *The approximate download times are listed at the bottom of this dialog.*

11. If the TrialDirector is not already running on your computer, it will automatically launch. The TrialDirector "Import Wizard" will also automatically launch and ask if you wish to import the images into the current case, a different case, or a new case. Select one of the options and click **[Next]**.
12. Then click **[Import]**.

Import from Compound Document Storage
Import
This wizard will help you to import items from a Compound Document Storage (*.cds).
Compound Document Storage files are commonly used as a convinient way to download or email document images and other case items.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Would you like to import items into the current case?
Yes, import the items to my current case
No, I'd like to create a new case
No, let me select a different case
Cancel
< Back
Next >
Import

Note: *The iCONECT images can be imported into any available TrialDirector case.*

13. Once the images have been imported into TrialDirector, the process is complete! The images will appear in the Document Manager module. You can now begin working with this information using TrialDirector.

Note: *The iCONECT images are placed in a unique subdirectory under the CDS folder of the current case path. For example, images downloaded from iCONECT may appear in a path similar to C:\Program Files\inData\Cases\Case0004\CDS\i431f534a_985*

More Information:

- About iCONECT Integration

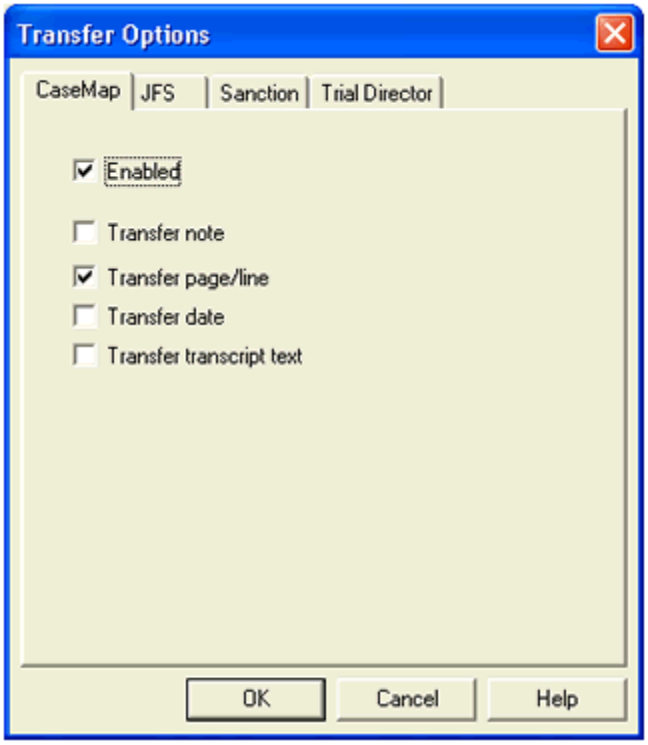
- Establishing Link
- Using iCONECT with TrialDirector

LiveNote

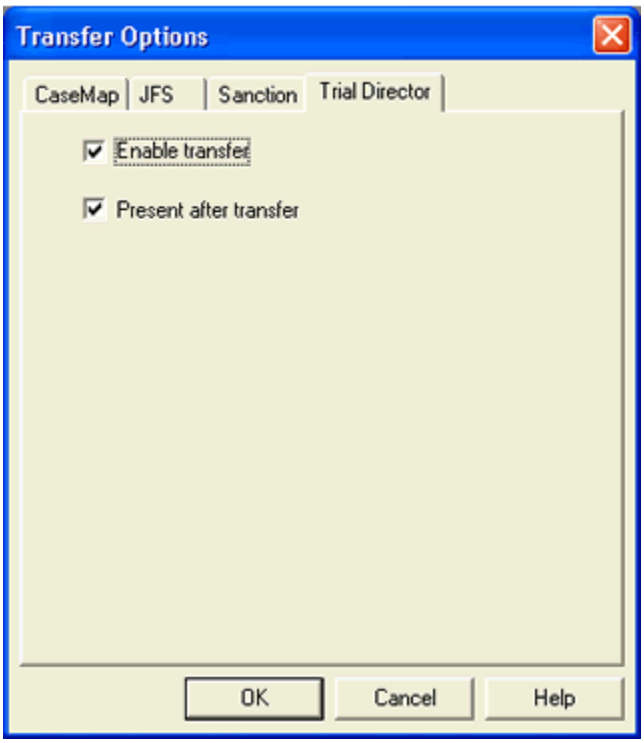
LiveNote - Establishing Link

The LiveNote transfer plug-in for TrialDirector is automatically established during the TrialDirector installation. The user only needs to set transfer preferences prior to taking advantage of the application integration. Below are the steps to establish LiveNote to TrialDirector transfer preferences.

1. Select **Transfer** from the LiveNote Options Menu. The following dialog will appear:



2. Select the TrialDirector tab, then make sure that the Enable Transfer option is checked. Select the **Present after transfer** option if you would like to automatically playback the LiveNote annotation clip in TrialDirector



3. Click **OK** the accept Changes.

More Information:

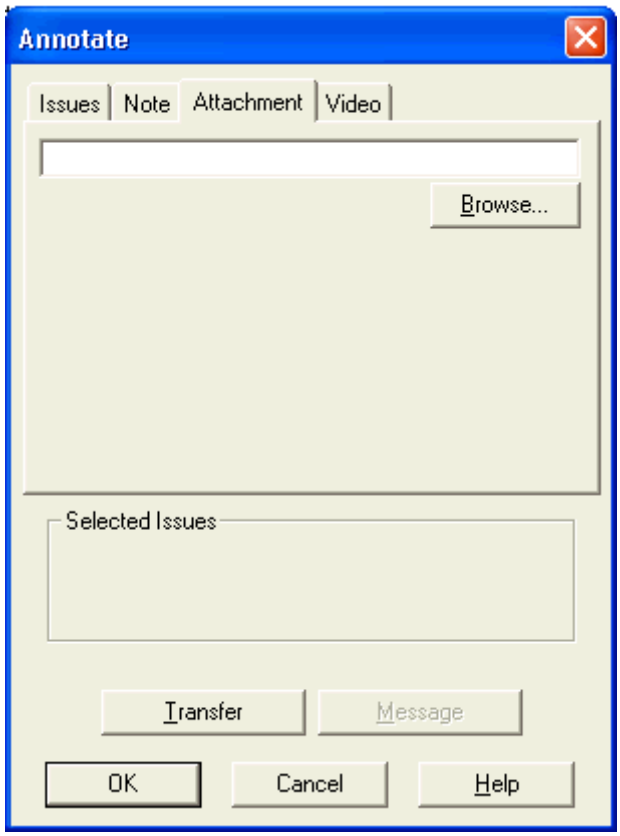
- Presentation Mode

Admit Trial Exhibits

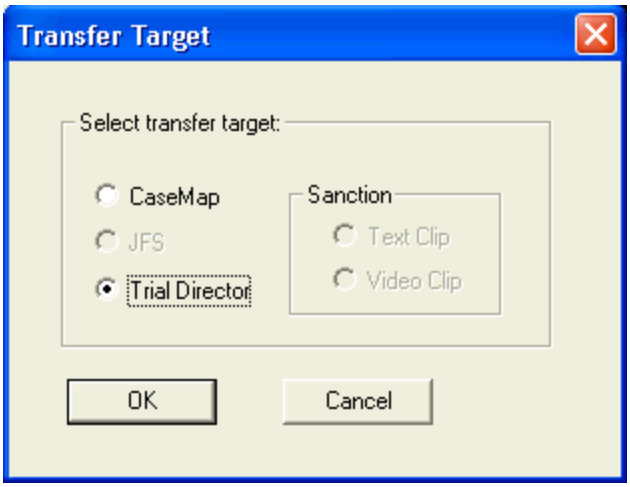
To send a LiveNote annotation to TrialDirector:

1. There are two ways that the annotation can be sent:

A. If you highlight part of a transcript and let go the mouse button the following dialog will appear



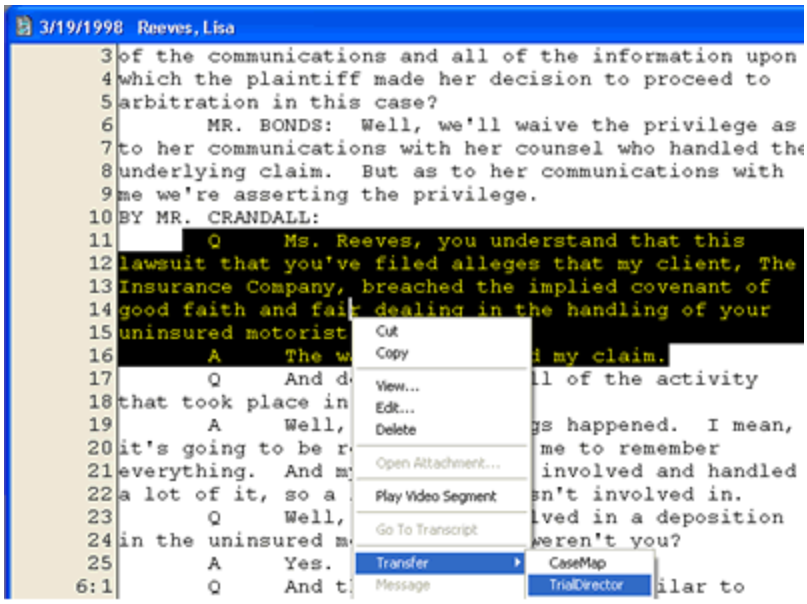
- Select Transfer



- Select TrialDirector and click **OK** to continue
- If this is the first time a transfer is performed, you will be requested to either select an existing TrialDirector Case or create a new case to associate with LiveNote. Either create a new case or select an existing TrialDirector Suite Case:

Associate a TrialDirector Suite Case...
TrialDirector Suite Case
When transferring data from LiveNote to the TrialDirector Suite, you must first establish a case association.
This association will provide the TrialDirector Suite with a location to store Transcripts, Clips, and other information received from LiveNote.
To continue, click OK.
To exit, click Cancel.
What would you like to do?
Create a new TrialDirector Suite case
Select an existing TrialDirector Suite case
OK
Cancel

B. Select the range of transcript text then right click to open the menu, then select **Transfer | TrialDirector**, as shown below.


3/19/1998 Reeves, Lisa
of the communications and all of the information upon
which the plaintiff made her decision to proceed to
arbitration in this case?
MR. BONDS: Well, we'll waive the privilege as
to her communications with her counsel who handled the
underlying claim. But as to her communications with
me we're asserting the privilege.
BY MR. CRANDALL:
Q Ms. Reeves, you understand that this
lawsuit that you've filed alleges that my client, The
Insurance Company, breached the implied covenant of
good faith and fair dealing in the handling of your
uninsured motorist
A The w i my claim.
Q And d ll of the activity
that took place in
A Well, gs happened. I mean,
it's going to be r me to remember
everything. And m involved and handled
a lot of it, so a sn't involved in.
Q Well, lved in a deposition
in the uninsured m weren't you?
A Yes.
Q And t ilar to
Cut
Copy
View...
Edit...
Delete
Open Attachment...
Play Video Segment
Go To Transcript
Transfer
Message
CaseMap
TrialDirector

- If this is the first time a transfer is performed, you will be requested to either select an existing TrialDirector Case or Create a new case to associate with LiveNote:

Associate a TrialDirector Suite Case...
TrialDirector Suite Case
When transferring data from LiveNote to the TrialDirector Suite, you must first establish a case association.
This association will provide the TrialDirector Suite with a location to store Transcripts, Clips, and other information received from LiveNote.
To continue, click OK.
To exit, click Cancel.
What would you like to do?
Create a new TrialDirector Suite case
Select an existing TrialDirector Suite case
OK
Cancel

- Select either **Create a new TrialDirector Case** or **Select an existing TrialDirector Case** and proceed to follow the appropriate dialog box's until your selection is complete.

2. The first time a transfer is performed the user is prompted to associate the multimedia files associated with the LiveNote transcript. Click the **Add** button the browse out and add the multimedia files.
3. Click **OK** when you have added the files

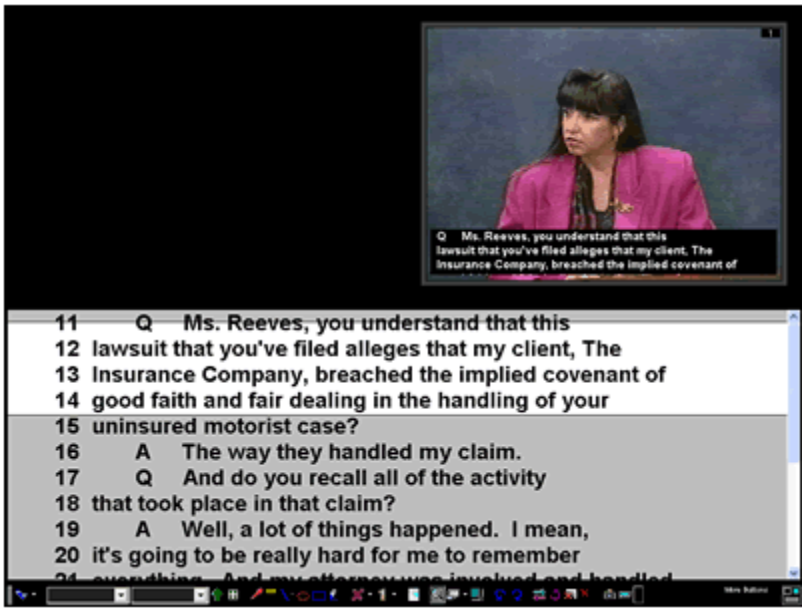
Locate Multimedia File(s)...
Multimedia Stream
Because of differences in how LiveNote and the TrialDirector Suite track and store multimedia information, you must specify all audio/video resource(s) for this transcript in chronological order at this time.
REE31298.MPG
Up
Down
Add
Remove
OK
Cancel

Note: *The Case and Multimedia file associated only have to be performed once. Future LiveNote transfers will automatically send the information to the TrialDirector Suite with any user interaction.*

- If the transfer to TrialDirector was completed successfully, the following dialog box will be displayed:

4. Click **OK** to Close

- If you selected the Enable Transfer and Present after Transfer options outlined in establishing, the LiveNote annotation clip will automatically play in TrialDirector, seen below:


Q Ms. Reeves, you understand that this lawsuit that you've filed alleges that my client, The Insurance Company, breached the implied covenant of
11 Q Ms. Reeves, you understand that this
12 lawsuit that you've filed alleges that my client, The
13 Insurance Company, breached the implied covenant of
14 good faith and fair dealing in the handling of your
15 uninsured motorist case?
16 A The way they handled my claim.
17 Q And do you recall all of the activity
18 that took place in that claim?
19 A Well, a lot of things happened. I mean,
20 it's going to be really hard for me to remember

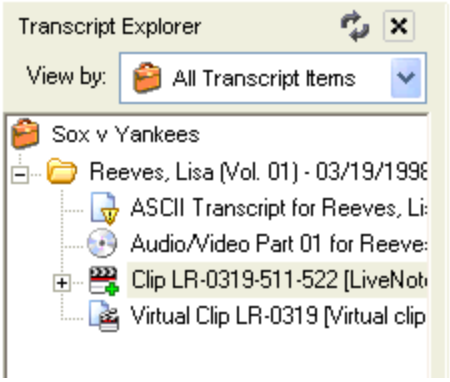
More Information:

- Presentation Mode

Using LiveNote with Transcript Manager

If you have created a link, created or added the annotations to an existing Case, the annotations will also be available in Transcript Manager. You will be able to perform all of the editing features available in Transcript Manager.

For example, the Transcript Explorer below shows the annotation that was created in LiveNote and sent to TrialDirector.



Clips that were created, but have not been edited with Transcript Manager have a small green plus sign on their icons, as shown above.

More Information:

- Presentation Mode

CT Summation Enterprise/iBlaze Integration

Getting Started with CT Summation Enterprise/iBlaze Integration

TrialDirector connects with CT Summation Enterprise/iBlaze so that you can access features from these leading litigation support programs together. When TrialDirector is integrated with Enterprise/iBlaze, you can work with key functions in TrialDirector directly from within Enterprise/iBlaze. For example, you can:

- View and mark-up images using TrialDirector's mark-up tools, or use Enterprise/iBlaze mark-up tools and incorporate these mark-ups with TrialDirector
- Create groups of documents using Enterprise's/iBlaze's Core Database and send them to TrialDirector workbooks
- Share transcripts between Enterprise/iBlaze and TrialDirector
- View video transcripts in Enterprise/iBlaze using TrialDirector's viewer

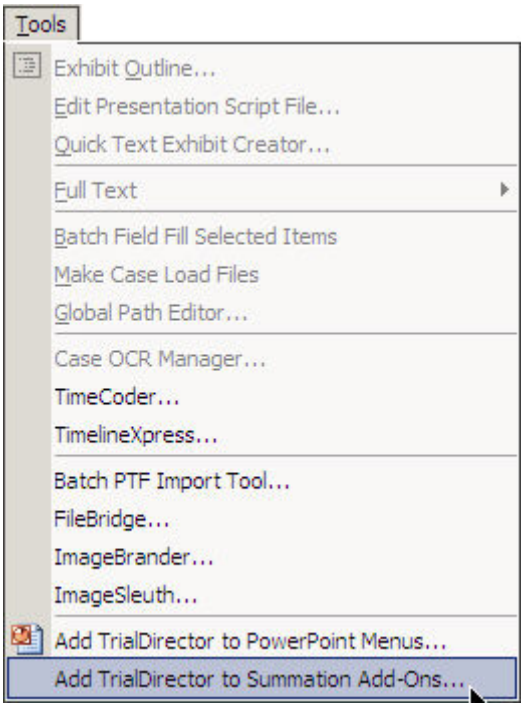
- Print condensed versions of Enterprise/iBlaze transcripts using TrialDirector's transcript printing options
- Create clips using Enterprise's/iBlaze's familiar tools and send the clips directly to TrialDirector for presentation in court

To connect TrialDirector and Enterprise/iBlaze so that they work together, you will have to take a few steps. First, you'll integrate the two programs. Next, you'll exchange the transcripts between each program. Finally, you'll share the document information in Enterprise/iBlaze with TrialDirector. After you've taken all three steps, the programs are ready to work together.

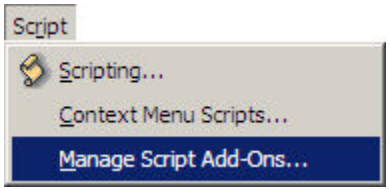
Step One: Integration

In order for you to use TrialDirector functions within Enterprise/iBlaze, you will need to make the programs aware of each other. This is referred to as "integration." Follow the instructions below to integrate the programs.

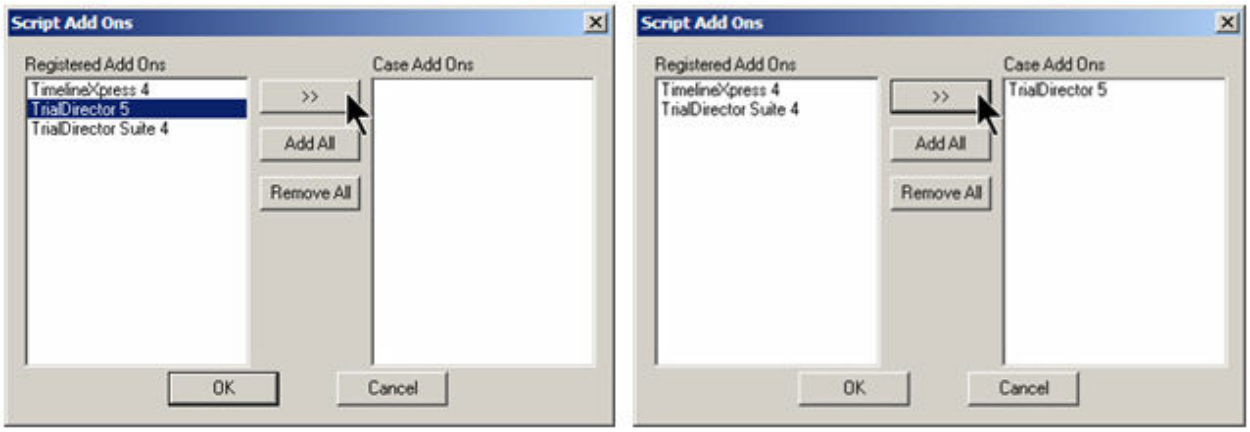
1. From the Transcripts Tab in TrialDirector, open the **Tools** menu and select **Add TrialDirector to Summation Add-Ons**.



2. Close TrialDirector and open Enterprise or iBlaze.
3. In Enterprise or iBlaze, click on the Script menu and select **Manage Script Add-Ons**...



The Script Add-Ons dialog opens.



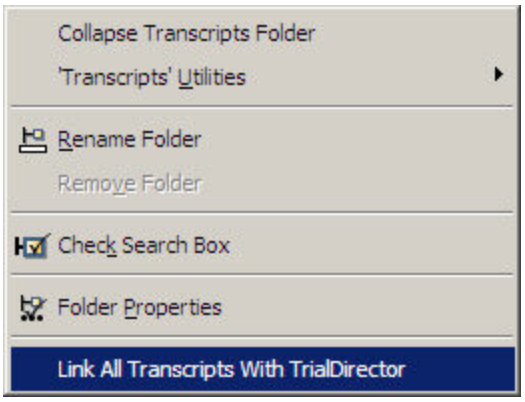
4. You should see TrialDirector 5 on the left side. (You may see other add-ons there, depending on how your system is configured.) Select TrialDirector 5 and click the >> button so that TrialDirector 5 now appears on the right side of the dialog box.
5. Click **OK**. TrialDirector is added to the Case Tools section of the Case Explorer tree in Enterprise/iBlaze.

Step Two: Exchanging Transcripts

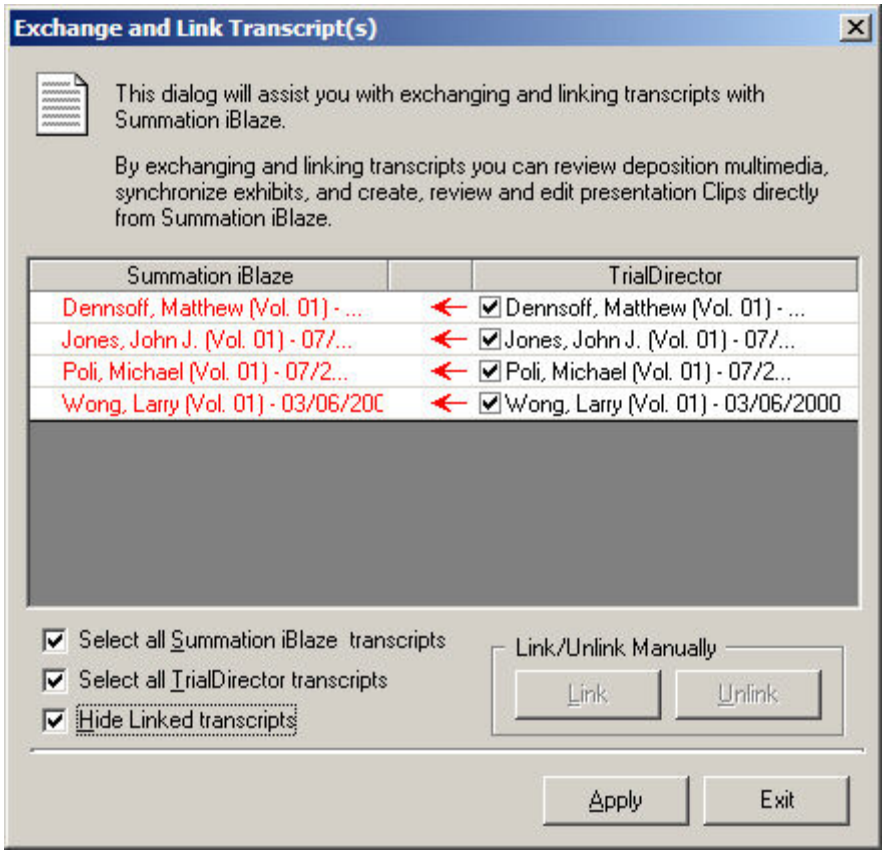
You can send transcripts that reside in Enterprise/iBlaze to TrialDirector , and you can send transcripts that reside in TrialDirector to Enterprise/iBlaze. At that point, the programs share the transcripts.

To Exchange Enterprise/iBlaze and TrialDirector Transcripts:

1. In Enterprise/iBlaze, right-click on **Transcripts** at the top of the Case Explorer tree. Select **Link All Transcripts with Trial Director**.

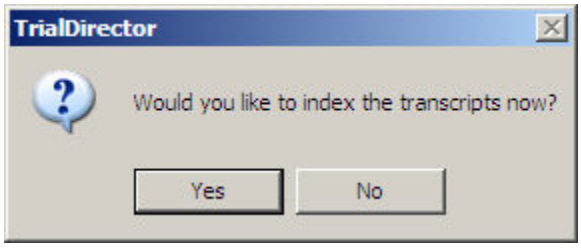


2. When the TrialDirector dialog opens, select the transcripts in Enterprise/iBlaze and Trial Director that you want to exchange and link. When a transcript is selected, a check mark appears in the check box adjacent to the transcript name.


Exchange and Link Transcript(s)
This dialog will assist you with exchanging and linking transcripts with Summation iBlaze.
By exchanging and linking transcripts you can review deposition multimedia, synchronize exhibits, and create, review and edit presentation Clips directly from Summation iBlaze.
Summation iBlaze
TrialDirector
Dennsoff, Matthew (Vol. 01) - ...
Dennsoff, Matthew (Vol. 01) - ...
Jones, John J. (Vol. 01) - 07/...
Jones, John J. (Vol. 01) - 07/...
Poli, Michael (Vol. 01) - 07/2...
Poli, Michael (Vol. 01) - 07/2...
Wong, Larry (Vol. 01) - 03/06/200
Wong, Larry (Vol. 01) - 03/06/2000
Select all Summation iBlaze transcripts
Select all TrialDirector transcripts
Hide Linked transcripts
Link/Unlink Manually
Link
Unlink
Apply
Exit

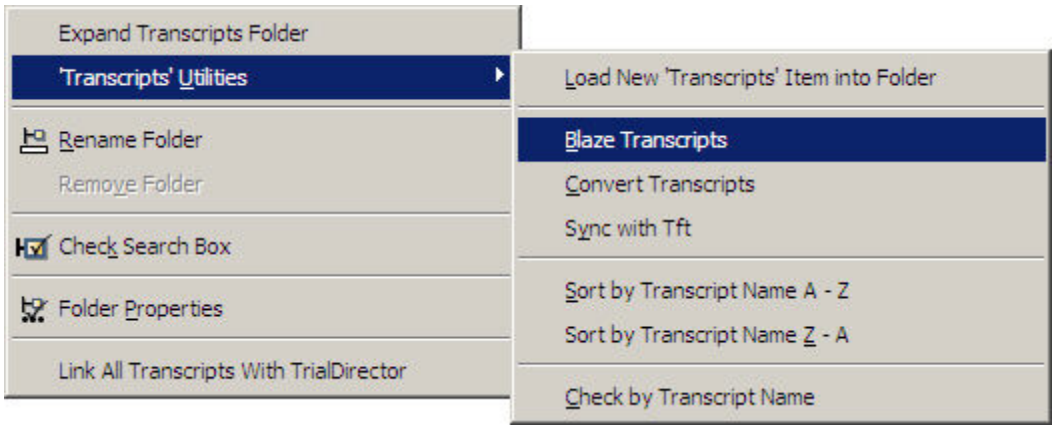
- You can select all Enterprise/iBlaze transcripts or all TrialDirector transcripts to be sent by checking the appropriate check box in the dialog. Note that the visible TrialDirector transcripts are the ones associated with the current TrialDirector case.
- By default, TrialDirector is set to hide all transcripts that have already been sent and linked. If you want to see a displayed list of all transcripts, whether they have been sent or not, then clear the check box next to **Hide Linked transcripts**.

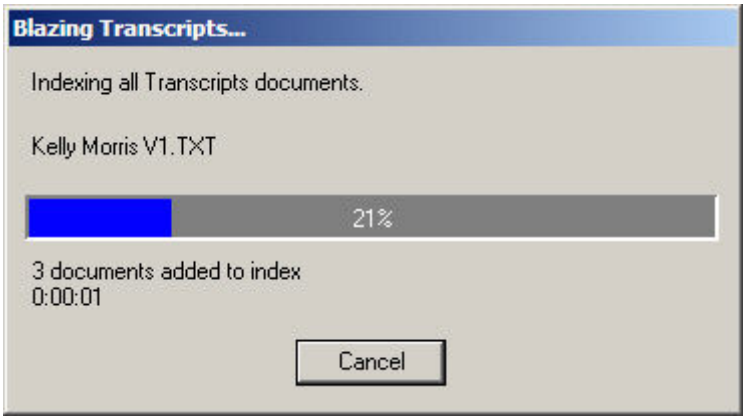
3. Click **Apply**. The programs will send and link each other's transcripts.
4. Click **Exit** to close the dialog box.
5. A prompt appears asking if you want to index the transcripts. Click **Yes** so that TrialDirector can create an index to all of the words in the transcripts.



If you want to index the transcripts later, click **No**. You should note, however, that until transcripts have been indexed in TrialDirector, you cannot search transcripts, view the Word Lists for the transcripts, or print the transcripts.

6. If you sent transcripts from TrialDirector to Enterprise/iBlaze, you will need to Blaze (index) the transcripts in Enterprise/iBlaze. To do so, right click on Transcripts in the Case Explorer tree, select **Transcripts Utilities**, then select **Blaze Transcripts**.





When the Blazing process is complete, the dialog closes.

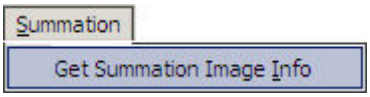
Step Three: Linking Documents

You can send Enterprise/iBlaze document images to TrialDirector using the following steps.

Note: You cannot send TrialDirector images back to Enterprise/iBlaze. TrialDirector's images will track with Enterprise/iBlaze as you move through the records in Enterprise/iBlaze.

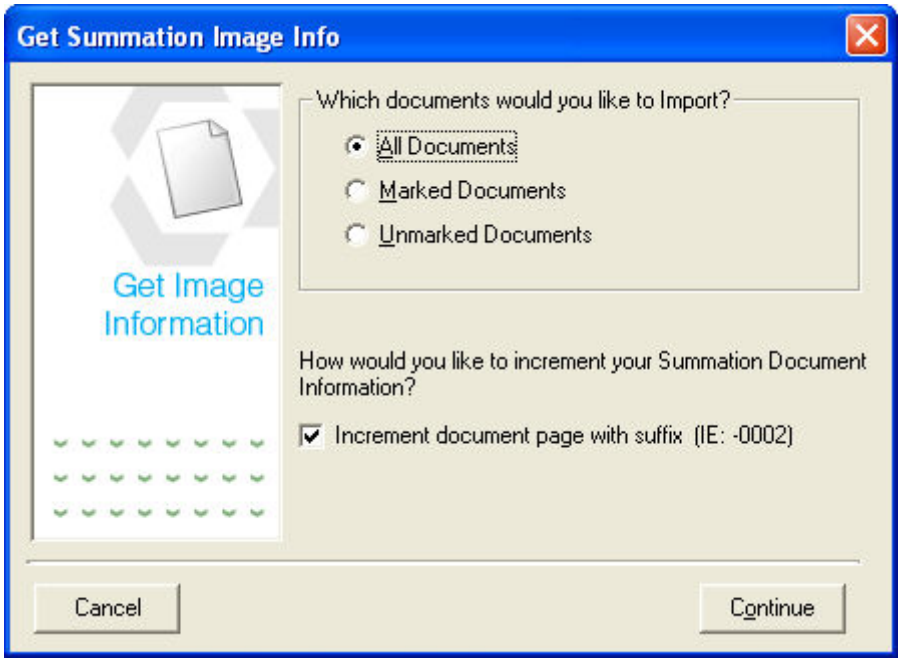
To Send Enterprise/iBlaze Imaged Documents to TrialDirector:

1. Make sure TrialDirector and Enterprise/iBlaze are open to the same case.
2. From the TrialDirector Document Manager tab, click on the **Summation** menu and select **Get Summation Image Info**.



- If the Summation menu does not appear in TrialDirector, you may need to go through the integration process again. See **Step One: Integration** above.

3. In the next dialog, you can choose which set of documents you'd like to import. If you do not wish to send all documents to Enterprise/iBlaze, use Enterprise's/iBlaze's Marking feature to select the document summaries. You can also choose how to increment the numbering on the imported images. The two options are to number with or without a suffix.



Example of importing with a suffix:

BDJ0030

BDJ0030-001

BDJ0030-002

BDJ0030-003

Example of importing without a suffix:

BDJ0030

BDJ0031

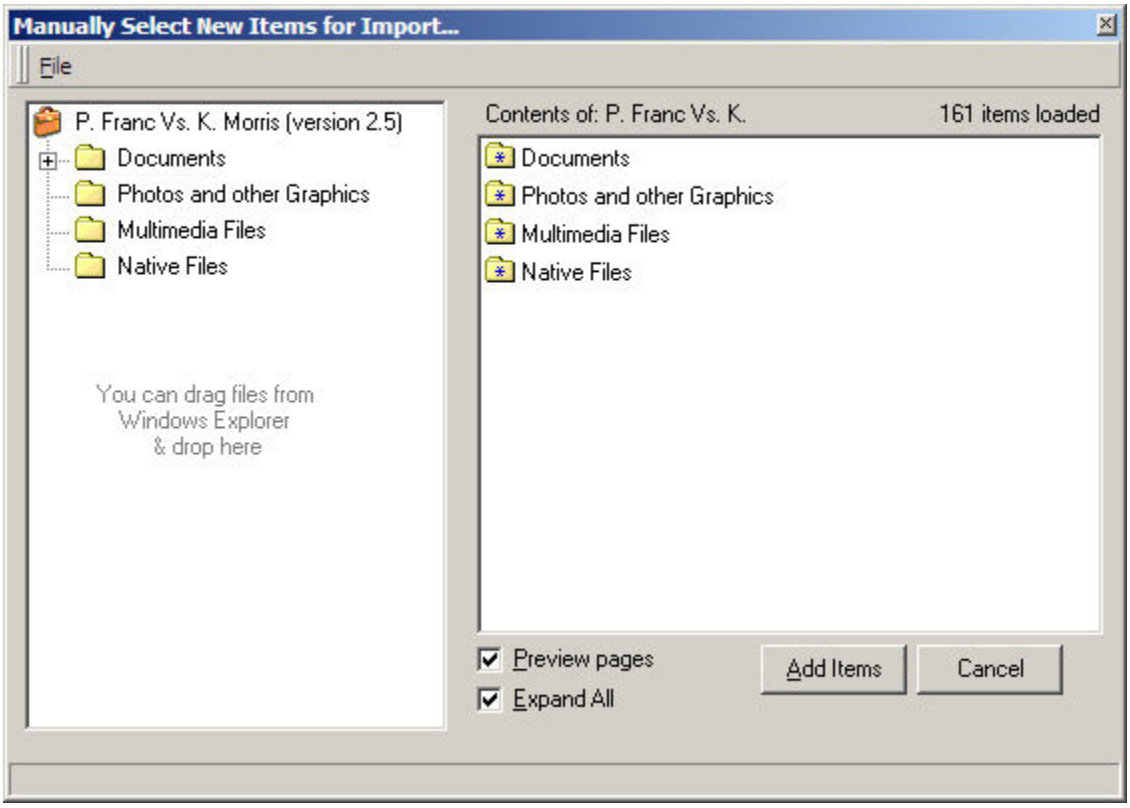
BDJ0032

BDJ0033

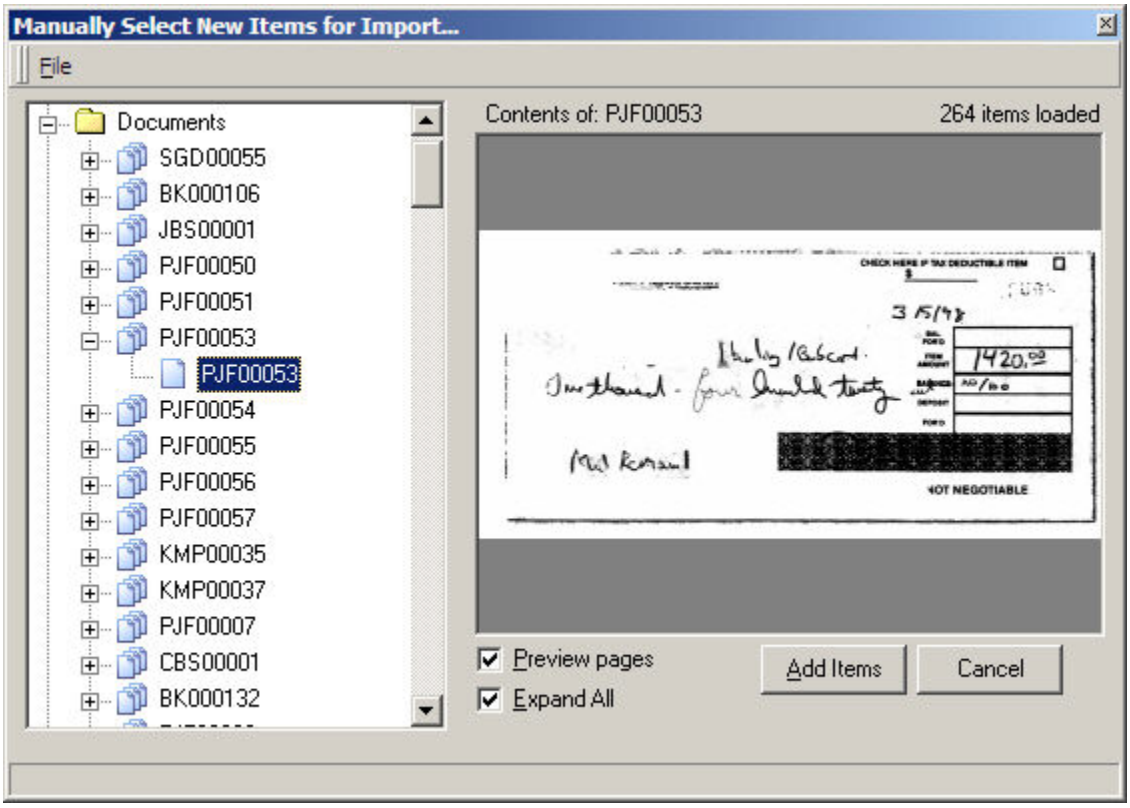
If you are sure that the document numbering in Enterprise/iBlaze is sequential – that is, there are no intermittent pages numbered with A's, B's, and so on – then you should import without a suffix. If, however, the pagination in Enterprise/iBlaze is not sequential or includes intermittent alphabetic suffixes, then you should import with a suffix.

After you have decided on a numbering option, click **Continue**.

4. TrialDirector begins processing the images based on the information contained in Summation's ImgInfo table. (For more information about the Enterprise/iBlaze ImgInfo table, refer to the Online Help.) The following dialog appears to give you the opportunity to review the images that are being exchanged with TrialDirector:



Click on the + next to Documents to expand the list of images. To view the image associated with the ID number, click the + next to the ID number. The image appears on the right side of the dialog.



5. When you are ready to exchange the images, click the **Add Items** button. The items are added to the Documents section of the Case Explorer in TrialDirector.

The contents of Enterprise's/iBlaze's Summary field is attached to each image as a memo. (To read more searching the contents of associated memos, see Search for Items.)

More Information:

- Sharing Transcripts with CT Summation Enterprise/iBlaze
- Sharing Images with CT Summation Enterprise/iBlaze

Sharing Images with CT Summation Enterprise/iBlaze

When CT Summation programs and TrialDirector are integrated, you can exchange images in CT Summation programs so that they appear in TrialDirector. You can exchange all images by using the Get Summation Info option under the Summation menu in TrialDirector.

Or, you can send selected images from CT Summation programs to TrialDirector. This might be the case if you have used CT Summation iBlaze to identify the key documents in your case to be used, for example, as trial exhibits. In that case, you might not want to send everything in iBlaze to TrialDirector but rather send only those key documents.

Or, if you are using iBlaze to identify exhibits that will be covered with specific witnesses, you may want to take advantage of that work to send those documents to specific Workbooks.

In any of these instances, you are using CT Summation iBlaze as the main database and then using iBlaze's database search tools to retrieve those records and send them to TrialDirector.

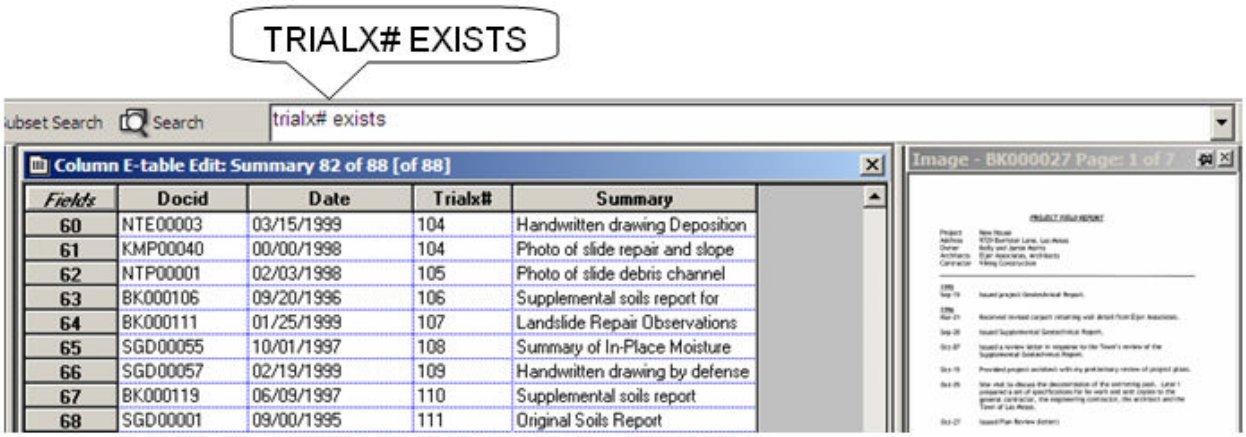
Sending Images from CT Summation Products to TrialDirector

You may choose to send selected images from CT Summation products to Trial Director. You can do this by sending the results of a search in Enterprise or iBlaze to Trial Director, or you can do this by marking summaries in Enterprise or iBlaze and then choosing whether to send marked or unmarked summaries to TrialDirector.

Note: It is always a good idea to back up your case databases before performing file imports. See Backup a Case for additional details.

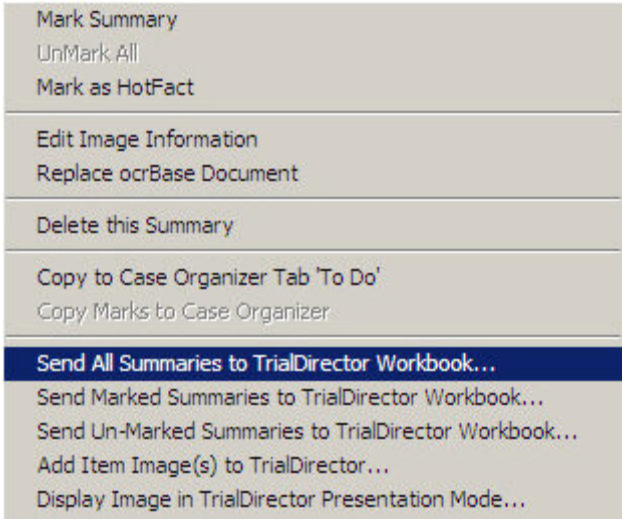
Sending Images to TrialDirector as a Result of a Search in Enterprise/iBlaze

1. Run a search in Enterprise/iBlaze Column View for the documents you wish to send to Trial Director. In the following example, the search is for every document identified as a trial exhibit in the **TRIALX#** field.
    - The search phrase is **TRIALX# EXISTS**, meaning there is at least one character in the TRIALX# field of the document's record/summary.

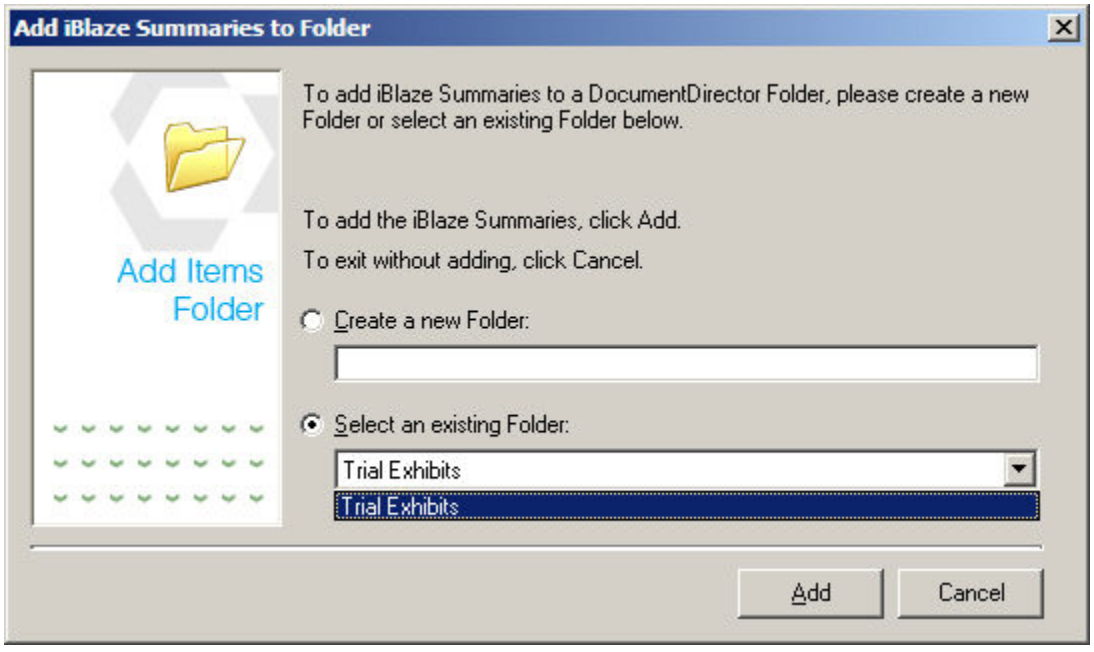


Fields	Docid	Date	Trialx#	Summary
60	NTE00003	03/15/1999	104	Handwritten drawing Deposition
61	KMP00040	00/00/1998	104	Photo of slide repair and slope
62	NTP00001	02/03/1998	105	Photo of slide debris channel
63	BK000106	09/20/1996	106	Supplemental soils report for
64	BK000111	01/25/1999	107	Landslide Repair Observations
65	SGD00055	10/01/1997	108	Summary of In-Place Moisture
66	SGD00057	02/19/1999	109	Handwritten drawing by defense
67	BK000119	06/09/1997	110	Supplemental soils report
68	SGD00001	09/00/1995	111	Original Soils Report

2. Right-click on the row number for any of the summaries that were returned as a result of your search. Select **Send All Summaries to TrialDirector Workbook**.


Mark Summary
UnMark All
Mark as HotFact
Edit Image Information
Replace ocrBase Document
Delete this Summary
Copy to Case Organizer Tab 'To Do'
Copy Marks to Case Organizer
Send All Summaries to TrialDirector Workbook...
Send Marked Summaries to TrialDirector Workbook...
Send Un-Marked Summaries to TrialDirector Workbook...
Add Item Image(s) to TrialDirector...
Display Image in TrialDirector Presentation Mode...

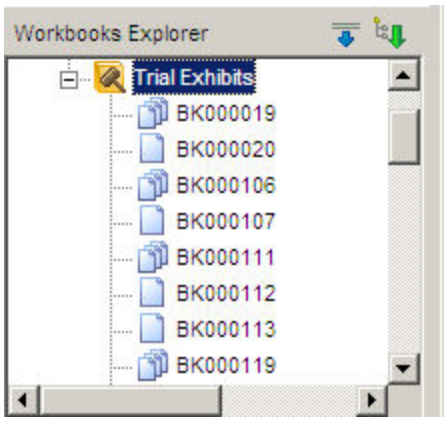
3. Switch to TrialDirector either by clicking on the TrialDirector button in the status bar at the bottom of your screen or by holding the ALT key down as you tap the TAB key to switch between open programs. The following dialog appears:


Add iBlaze Summaries to Folder
To add iBlaze Summaries to a DocumentDirector Folder, please create a new Folder or select an existing Folder below.
Add Items Folder
To add the iBlaze Summaries, click Add.
To exit without adding, click Cancel.
Create a new Folder:
Select an existing Folder:
Trial Exhibits
Trial Exhibits
Add
Cancel

4. You can create a new Workbook by entering a name in under **Create a new Workbook** or you can select from existing Workbooks by clicking on the drop-down arrow under **Select an existing Workbook**.

- TrialDirector automatically creates a Trial Exhibits Workbook when a new case is created in TrialDirector, so in this example, we selected that Workbook.

5. Click **Add** to add the images to the Workbook. (To stop the process and begin again, click **Cancel**.). The images from iBlaze now appear in the Trial Exhibits folder in TrialDirector.



Sending Marked (or Unmarked) Summaries to TrialDirector

1. Mark the summaries in iBlaze using one of the following techniques:

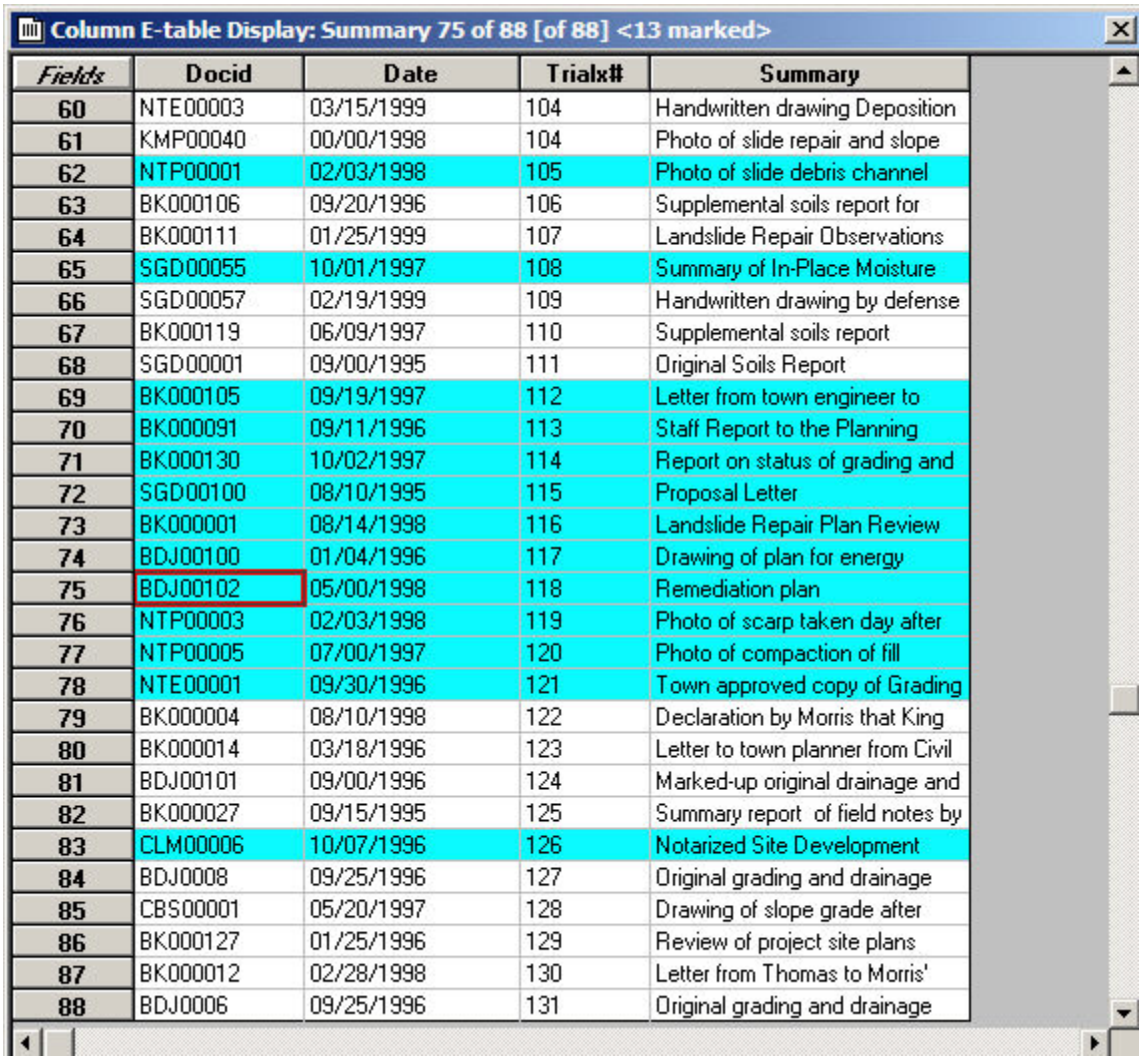
- Right-click on the row number for a single summary and select **Mark Summary**

OR

- Select the summary by clicking on it and hit the keys **CTRL+M** on your keyboard

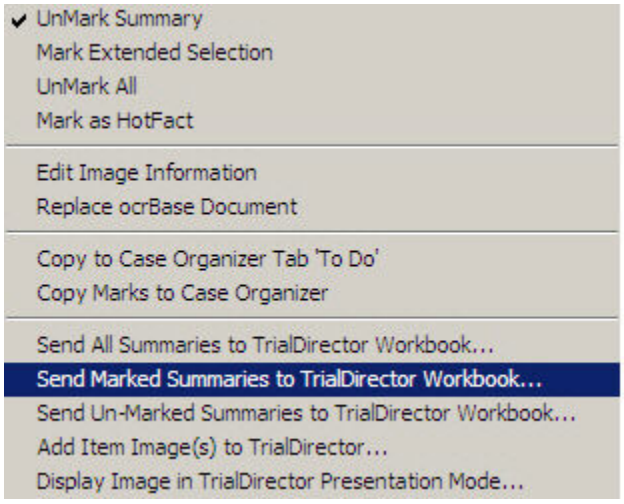
OR

- Double-click on the row number for the summary and close any dialog boxes that may open in iBlaze.
- To mark multiple adjacent summaries by marking the first summary (as described in a. or b. above) then right-clicking on the row number for the last summary in the group and selecting **Mark Extended Selection**. You may also hold down the **SHIFT** key as you click on the last row to mark all of the summaries in the group.

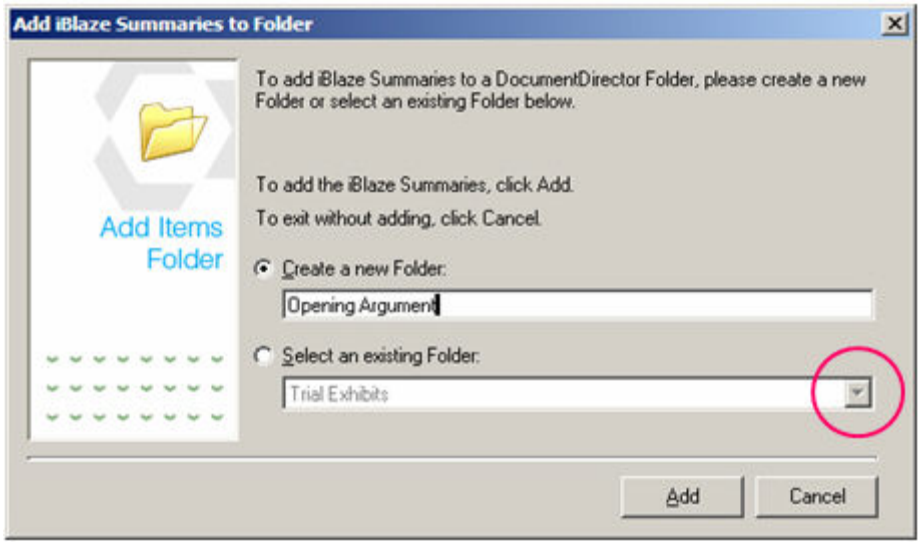

Column E-table Display: Summary 75 of 88 [of 88] <13 marked>

Fields	Docid	Date	Trialx#	Summary
60	NTE00003	03/15/1999	104	Handwritten drawing Deposition
61	KMP00040	00/00/1998	104	Photo of slide repair and slope
62	NTP00001	02/03/1998	105	Photo of slide debris channel
63	BK000106	09/20/1996	106	Supplemental soils report for
64	BK000111	01/25/1999	107	Landslide Repair Observations
65	SGD00055	10/01/1997	108	Summary of In-Place Moisture
66	SGD00057	02/19/1999	109	Handwritten drawing by defense
67	BK000119	06/09/1997	110	Supplemental soils report
68	SGD00001	09/00/1995	111	Original Soils Report
69	BK000105	09/19/1997	112	Letter from town engineer to
70	BK000091	09/11/1996	113	Staff Report to the Planning
71	BK000130	10/02/1997	114	Report on status of grading and
72	SGD00100	08/10/1995	115	Proposal Letter
73	BK000001	08/14/1998	116	Landslide Repair Plan Review
74	BDJ00100	01/04/1996	117	Drawing of plan for energy
75	BDJ00102	05/00/1998	118	Remediation plan
76	NTP00003	02/03/1998	119	Photo of scarp taken day after
77	NTP00005	07/00/1997	120	Photo of compaction of fill
78	NTE00001	09/30/1996	121	Town approved copy of Grading
79	BK000004	08/10/1998	122	Declaration by Morris that King
80	BK000014	03/18/1996	123	Letter to town planner from Civil
81	BDJ00101	09/00/1996	124	Marked-up original drainage and
82	BK000027	09/15/1995	125	Summary report of field notes by
83	CLM00006	10/07/1996	126	Notarized Site Development
84	BDJ0008	09/25/1996	127	Original grading and drainage
85	CBS00001	05/20/1997	128	Drawing of slope grade after
86	BK000127	01/25/1996	129	Review of project site plans
87	BK000012	02/28/1998	130	Letter from Thomas to Morris'
88	BDJ0006	09/25/1996	131	Original grading and drainage

2. When the documents that you want to send to TrialDirector are marked, right-click on any row number and select either **Send Marked Summaries to TrialDirector Workbook** or **Send Unmarked Summaries to TrialDirector Workbook**, as appropriate.


UnMark Summary
Mark Extended Selection
UnMark All
Mark as HotFact
Edit Image Information
Replace ocrBase Document
Copy to Case Organizer Tab 'To Do'
Copy Marks to Case Organizer
Send All Summaries to TrialDirector Workbook...
Send Marked Summaries to TrialDirector Workbook...
Send Un-Marked Summaries to TrialDirector Workbook...
Add Item Image(s) to TrialDirector...
Display Image in TrialDirector Presentation Mode...

3. Switch to TrialDirector by clicking on the TrialDirector button in the status bar.

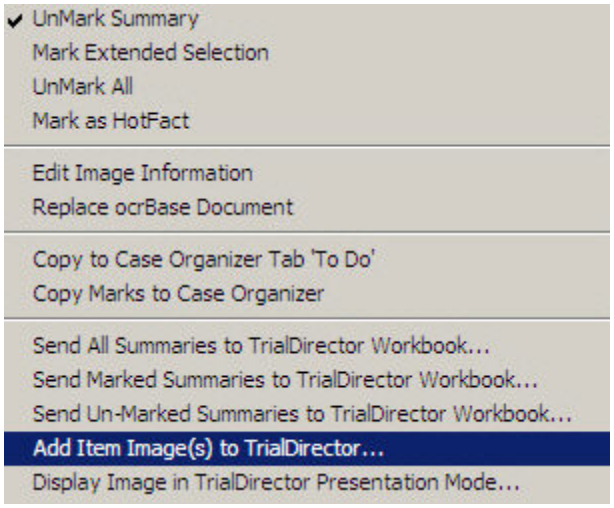

Add iBlaze Summaries to Folder
To add iBlaze Summaries to a DocumentDirector Folder, please create a new Folder or select an existing Folder below.
Add Items Folder
To add the iBlaze Summaries, click Add.
To exit without adding, click Cancel.
Create a new Folder:
Opening Argument
Select an existing Folder:
Trial Exhibits
Add
Cancel

4. Either add a new Workbook by entering a name in the **Create a new Workbook** dialog box or click on the drop-down arrow to **Select an Existing Workbook**. Click **Add**. The items you selected are now added to the Workbook.

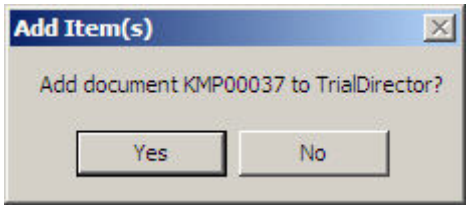
Adding a Single Enterprise/iBlaze Document to TrialDirector

1. Select the document summary in iBlaze that you wish to send to TrialDirector.

2. Right-click on the row number for that summary, and select **Add Item Image(s) to TrialDirector…**


UnMark Summary
Mark Extended Selection
UnMark All
Mark as HotFact
Edit Image Information
Replace ocrBase Document
Copy to Case Organizer Tab 'To Do'
Copy Marks to Case Organizer
Send All Summaries to TrialDirector Workbook...
Send Marked Summaries to TrialDirector Workbook...
Send Un-Marked Summaries to TrialDirector Workbook...
Add Item Image(s) to TrialDirector...
Display Image in TrialDirector Presentation Mode...

3. Click **Yes** in the Add Item(s) dialog to add the document to TrialDirector. Click **No** to cancel the process.

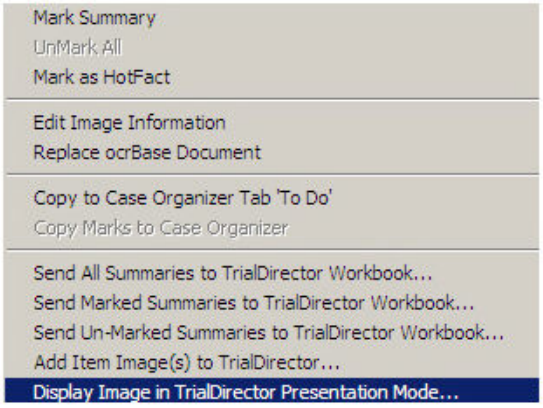


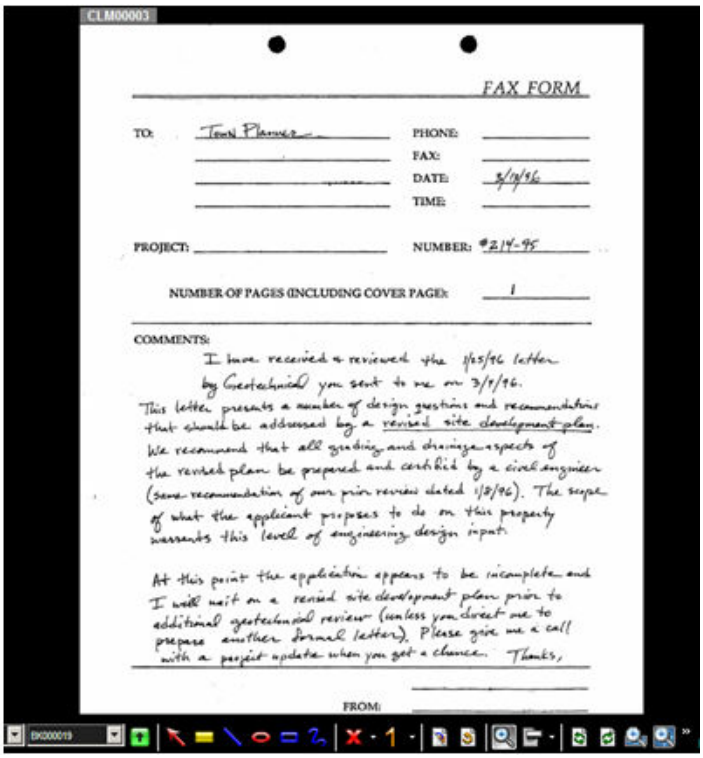
If you selected **Yes**, the document is added to TrialDirector.

Presenting a Document Directly from CT Summation Enterprise/iBlaze

Typically, you would run TrialDirector separately from a CT Summation program in the courtroom. But you may find, on occasion, that you would like to present a document directly from Enterprise or iBlaze.

1. Select the document you wish to present in the CT Summation program you are using.
2. Right-click on the row number for the document and select **Display Image in TrialDirector Presentation Mode** from the menu. TrialDirector's Presentation screen opens on your desktop displaying the selected document.


Mark Summary
UnMark All
Mark as HotFact
Edit Image Information
Replace ocrBase Document
Copy to Case Organizer Tab 'To Do'
Copy Marks to Case Organizer
Send All Summaries to TrialDirector Workbook...
Send Marked Summaries to TrialDirector Workbook...
Send Un-Marked Summaries to TrialDirector Workbook...
Add Item Image(s) to TrialDirector...
Display Image in TrialDirector Presentation Mode...



More Information:

- CT Summation Enterprise/iBlaze Integration
- Sharing Transcripts with CT Summation Enterprise/iBlaze

Sharing Transcripts with CT Summation Enterprise/iBlaze

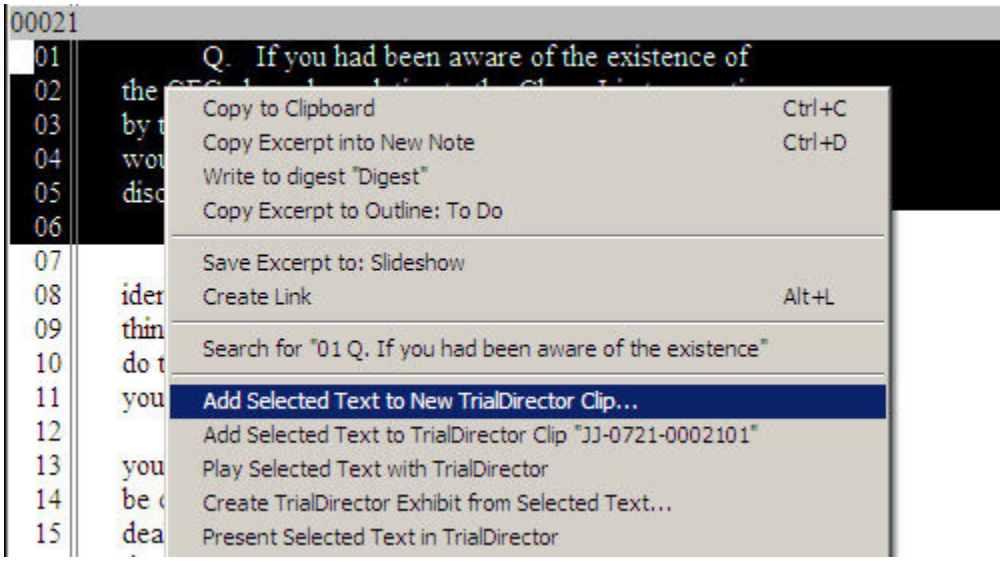
When your cases are shared by TrialDirector and CT Summation Enterprise/iBlaze, you have easy access to several of TrialDirector's advanced transcript handling functions. From within Enterprise or iBlaze, you can create transcript clips which will present in TrialDirector (clips will present with video if TrialDirector has the DVT), create quick text exhibits from transcript text to display in Presentation mode, or even present clips directly from Enterprise/iBlaze to TrialDirector's Presentation Mode.

Creating Video Clips

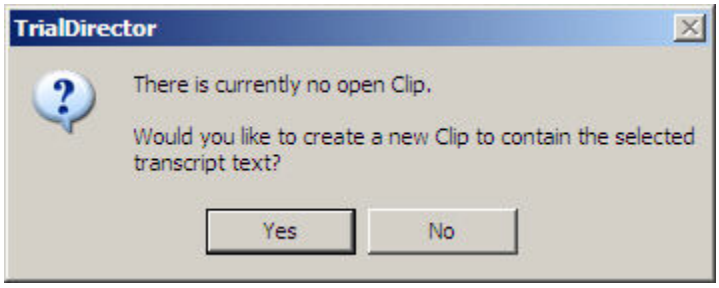
If depositions shared between TrialDirector and Enterprise/iBlaze are associated with video, you can create video clips directly in Enterprise/iBlaze. You can use two techniques: one is to highlight the text and create the clip based on the highlighting. The second is to create Transcript Notes for your video clips and send all of the notes over to TrialDirector. The second technique sends *all* notes to TrialDirector, whether or not they are ones you specifically designated as video clips. If you use the second technique, you may wish to limit your Enterprise/iBlaze Transcript Notes strictly to create video clips.

Creating Clips based on Highlighting

1. Double-click on the transcript name in the Enterprise/iBlaze Case Explorer to open the transcript you want to work with.
2. With the transcript open and in the active window, conduct a search for the text in the transcript you want to identify as a clip, or scroll through the transcript until you find the first selection.
3. Highlight the lines of text for the video clip. You can highlight the lines by holding down the left mouse button and dragging the highlight or, if you have to cross over a page break, you may find it easier to highlight lines using a combination of the SHIFT key and the keyboard's arrows.

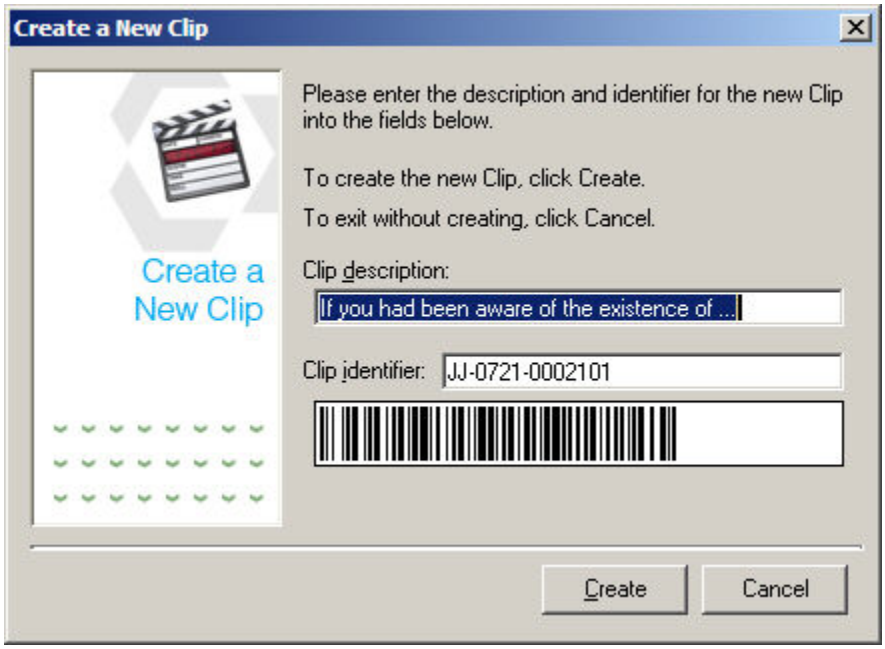

00021
01 Q. If you had been aware of the existence of
Copy to Clipboard Ctrl+C
Copy Excerpt into New Note Ctrl+D
Write to digest "Digest"
Copy Excerpt to Outline: To Do
Save Excerpt to: Slideshow
Create Link Alt+L
Search for "01 Q. If you had been aware of the existence"
Add Selected Text to New TrialDirector Clip...
Add Selected Text to TrialDirector Clip "JJ-0721-0002101"
Play Selected Text with TrialDirector
Create TrialDirector Exhibit from Selected Text...
Present Selected Text in TrialDirector

4. Right-click on the highlighted text and select **Add Selected Text to New TrialDirector Clip** to create a new clip **OR** select **Add Selected Text to TrialDirector Clip "[item id number]"** if you are adding a new segment to an existing clip. If there is no currently open clip, you will see the following dialog. Click **Yes** to create a new clip.

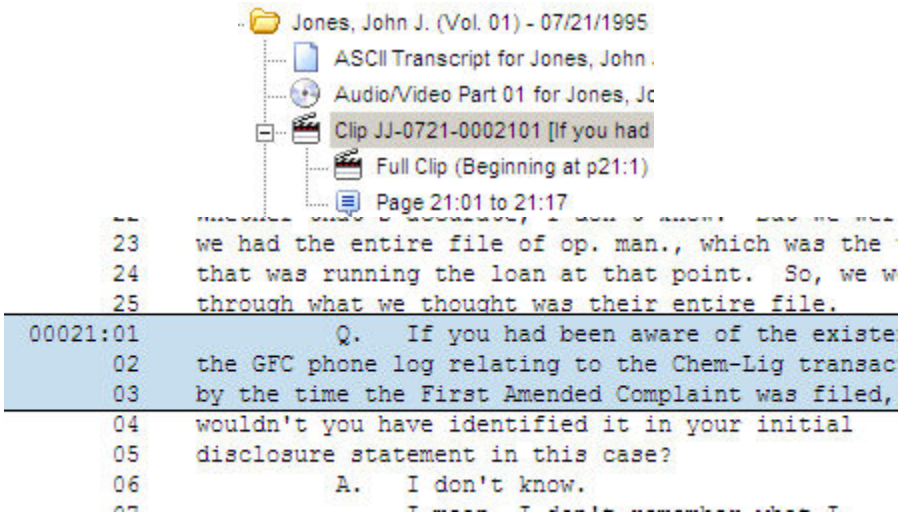

TrialDirector
There is currently no open Clip.
Would you like to create a new Clip to contain the selected transcript text?
Yes
No

(See Help topic Create a Clip for more information.)

5. In the following dialog, enter a description for the clip. You may use the existing description (the first few words of the clip) or you may enter your own description. You may also modify the clip identifier, if you wish. When the description and identifier are set up the way you wish, click **Create**.


Create a New Clip
Please enter the description and identifier for the new Clip into the fields below.
To create the new Clip, click Create.
To exit without creating, click Cancel.
Clip description:
If you had been aware of the existence of ...
Clip identifier:
JJ-0721-0002101
Create
Cancel

6. The clip now appears in TrialDirector's Transcript Manager window, where you can play the clip, edit it, delete it or rename it.

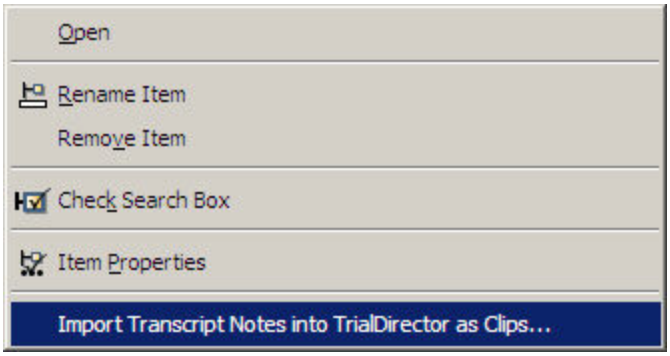

Jones, John J. (Vol. 01) - 07/21/1995
ASCII Transcript for Jones, John
Audio/Video Part 01 for Jones, Jc
Clip JJ-0721-0002101 [If you had
Full Clip (Beginning at p21:1)
Page 21:01 to 21:17
we had the entire file of op. man., which was the
that was running the loan at that point. So, we w
through what we thought was their entire file.
00021:01 Q. If you had been aware of the existe
the GFC phone log relating to the Chem-Lig transac
by the time the First Amended Complaint was filed,
wouldn't you have identified it in your initial
disclosure statement in this case?
A. I don't know.

(See Help topic Clips for more information.)

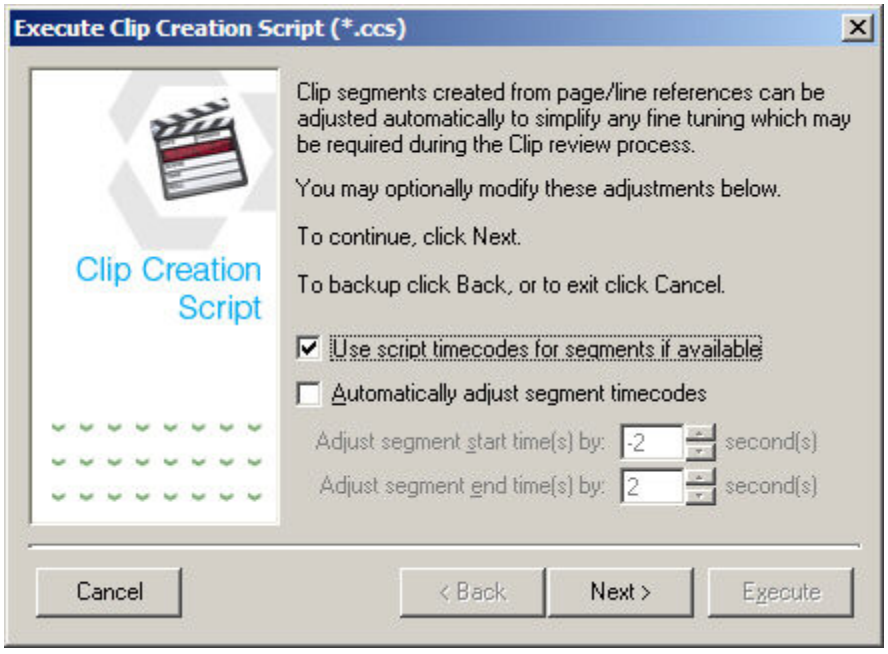
Creating Clips from Transcript Notes

Note: *This function creates a clip for every Transcript Note in Enterprise/iBlaze, not for selected notes.*

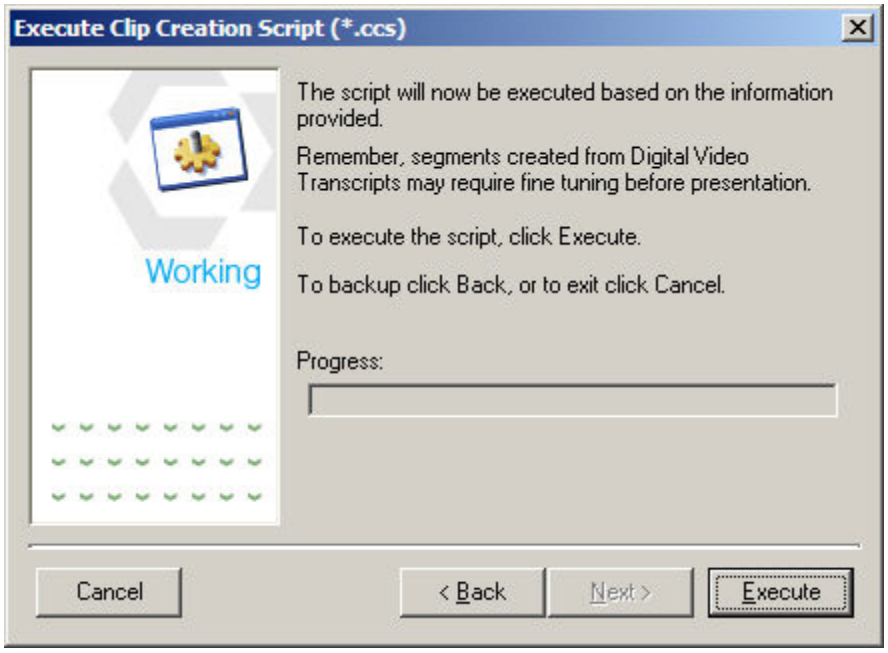
1. In the Enterprise/iBlaze Case Explorer window, right-click on Transcript Notes and select **Import Transcript Notes into TrialDirector as Clips...**



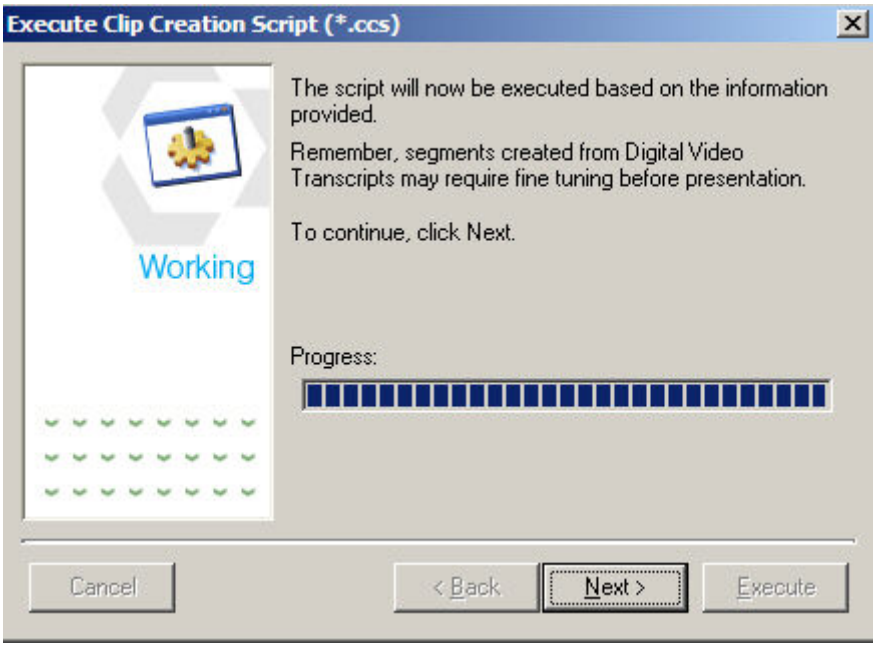
2. The following dialog opens giving you the opportunity to determine automatic adjustments for fine tuning scripts. Select the adjustment(s) you wish to use, if any, and click **Next**. To cancel the process, click **Cancel**.


Execute Clip Creation Script (*.ccs)
Clip Creation Script
Clip segments created from page/line references can be adjusted automatically to simplify any fine tuning which may be required during the Clip review process.
You may optionally modify these adjustments below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Use script timecodes for segments if available
Automatically adjust segment timecodes
Adjust segment start time(s) by: -2 second(s)
Adjust segment end time(s) by: 2 second(s)
Cancel
< Back
Next >
Execute

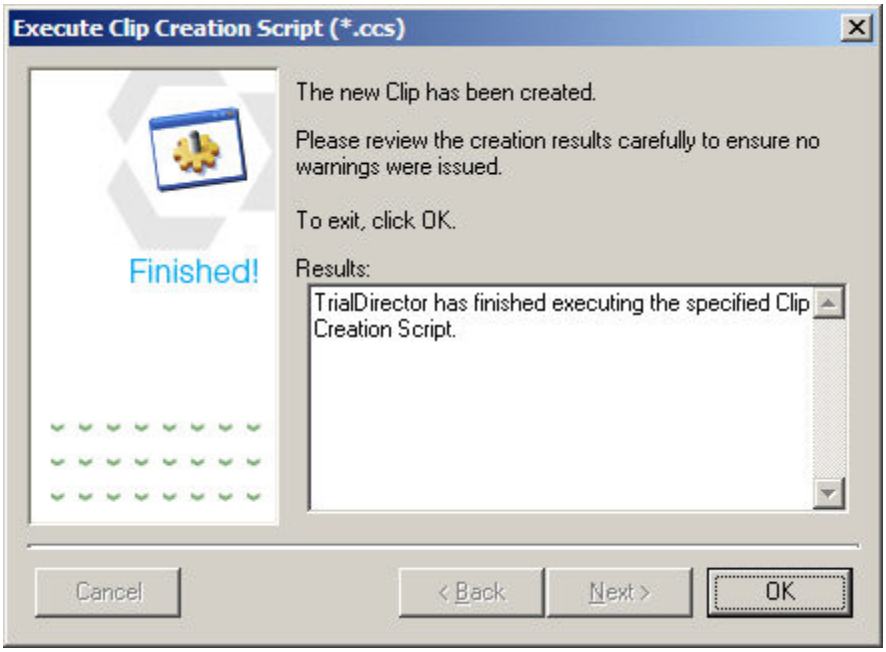
3. To proceed with sending the clips to TrialDirector, click **Execute**.


Execute Clip Creation Script (*.ccs)
Working
The script will now be executed based on the information provided.
Remember, segments created from Digital Video Transcripts may require fine tuning before presentation.
To execute the script, click Execute.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Execute

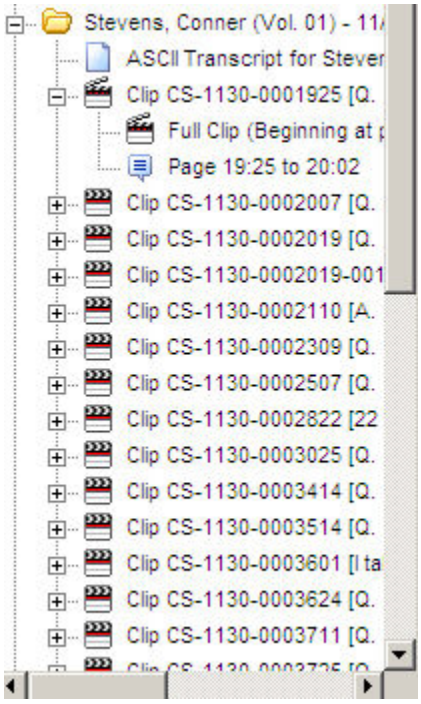
A progress bar advises you as the clips are transferred to TrialDirector. Click **Next**.


Execute Clip Creation Script (*.ccs)
Working
The script will now be executed based on the information provided.
Remember, segments created from Digital Video Transcripts may require fine tuning before presentation.
To continue, click Next.
Progress:
Cancel
< Back
Next >
Execute

4. TrialDirector confirms that the clips have been created. Click **OK** to close the dialog.


Execute Clip Creation Script (*.ccs)
Finished!
The new Clip has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Results:
TrialDirector has finished executing the specified Clip Creation Script.
Cancel
< Back
Next >
OK

5. The clips now appear in TrialDirector's Transcript Manager.



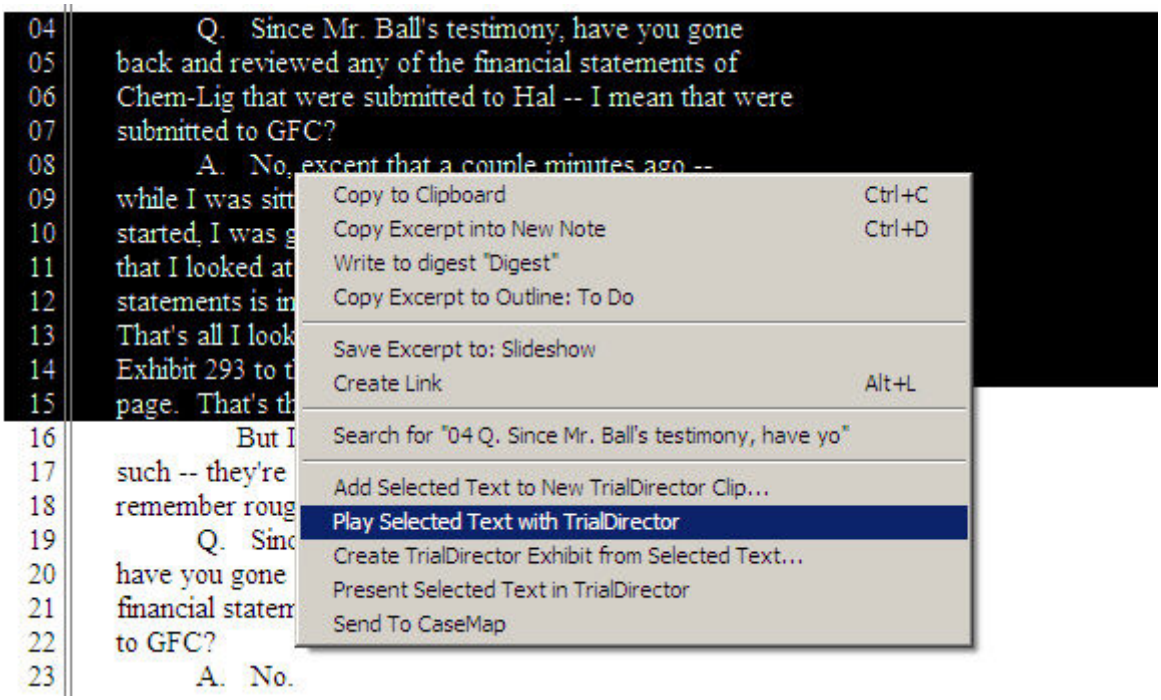
Playing Enterprise/iBlaze Transcript Text in TrialDirector

You can play video clips directly from within Enterprise/iBlaze, if a video is associated with the transcript and linked to TrialDirector.

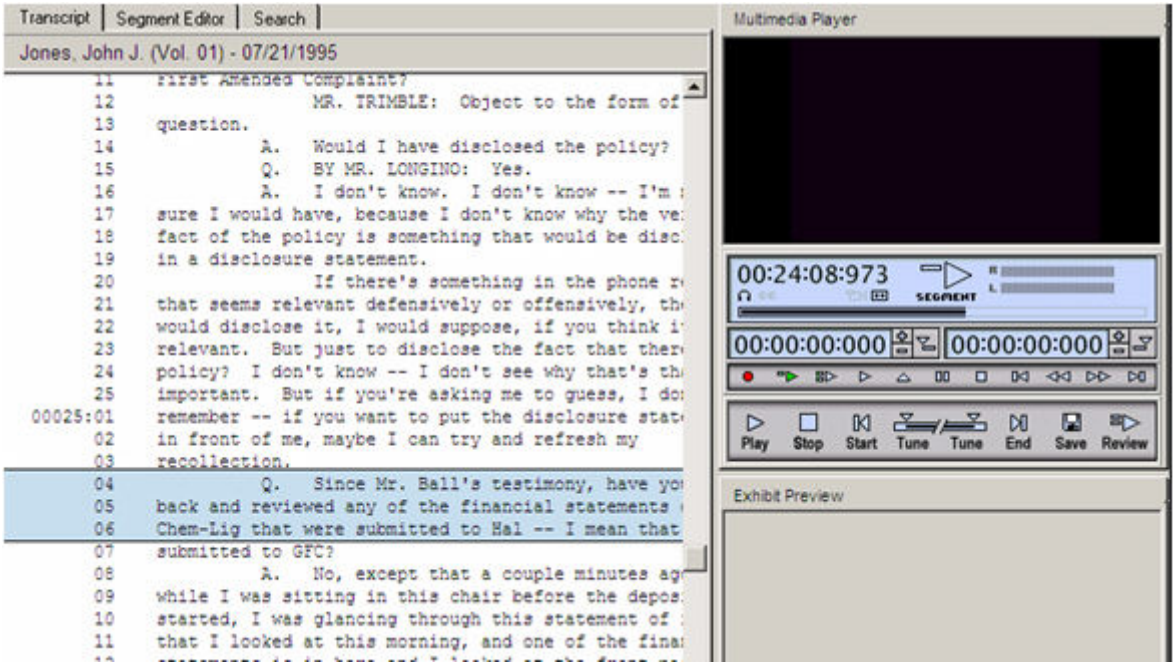
1. Highlight the lines of text in the Enterprise/iBlaze transcript, either by holding down the left mouse button and dragging the highlighting or by using a combination of SHIFT and the arrows on your keyboard to create the highlighted section.

2. Right-click on the highlighted section and select **Play Selected Text with TrialDirector**. The segment plays in TrialDirector's Transcript Manager window.

iBlaze Transcript Window


Q. Since Mr. Ball's testimony, have you gone
back and reviewed any of the financial statements of
Chem-Lig that were submitted to Hal -- I mean that were
submitted to GFC?
A. No, except that a couple minutes ago --
while I was sitt
started, I was g
that I looked at
statements is in
That's all I look
Exhibit 293 to t
page. That's th
But I
such -- they're
remember roug
Q. Sinc
have you gone
financial statem
to GFC?
A. No.
Copy to Clipboard Ctrl+C
Copy Excerpt into New Note Ctrl+D
Write to digest "Digest"
Copy Excerpt to Outline: To Do
Save Excerpt to: Slideshow
Create Link Alt+L
Search for "04 Q. Since Mr. Ball's testimony, have yo"
Add Selected Text to New TrialDirector Clip...
Play Selected Text with TrialDirector
Create TrialDirector Exhibit from Selected Text...
Present Selected Text in TrialDirector
Send To CaseMap

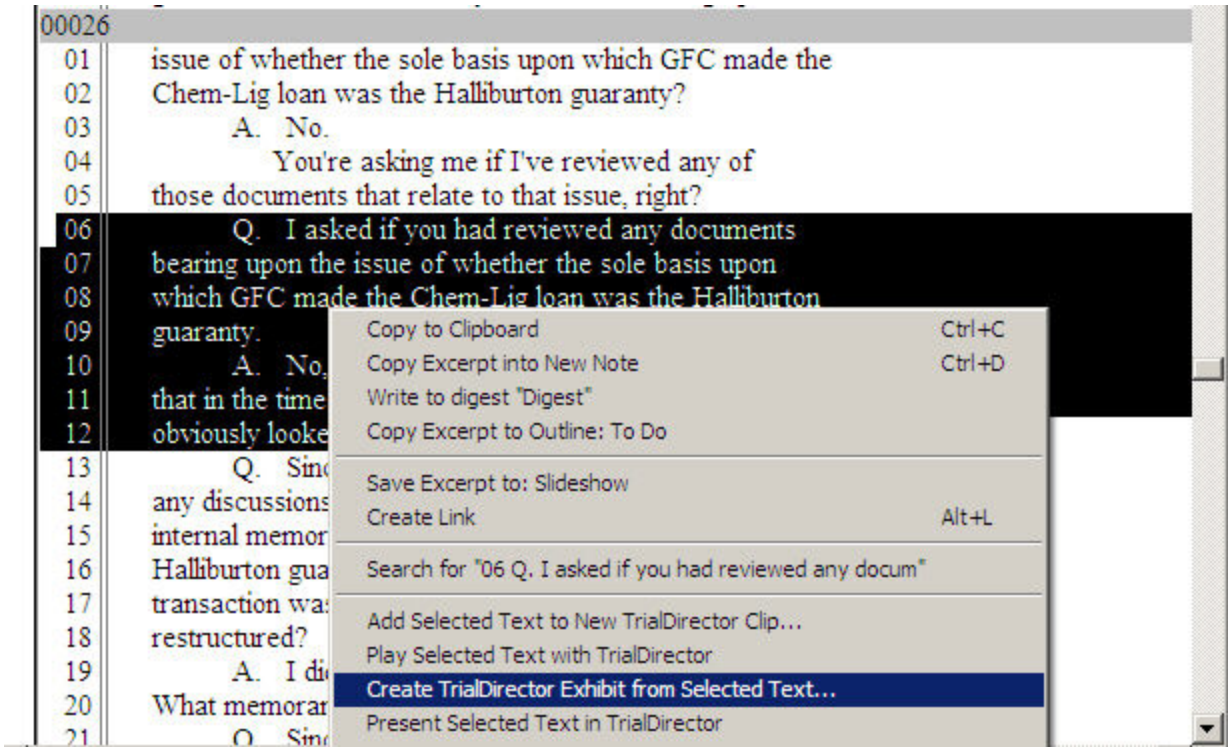
TrialDirector's Transcript Manager



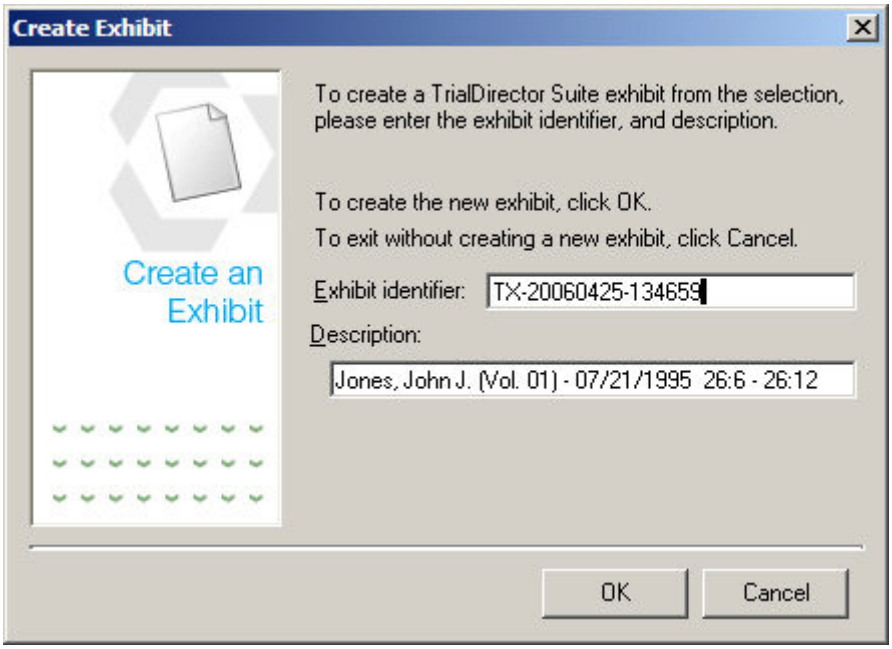
Creating Quick Exhibits from Enterprise/iBlaze Transcript Excerpts

Using the integration between Enterprise/iBlaze and TrialDirector, you can quickly create an excerpt of transcript text to be displayed as an exhibit in the courtroom. No more having to scan the pages of transcripts in order to be able to show transcript text as an image.

1. Highlight the lines of text in the Enterprise/iBlaze transcript that you want to display in TrialDirector.

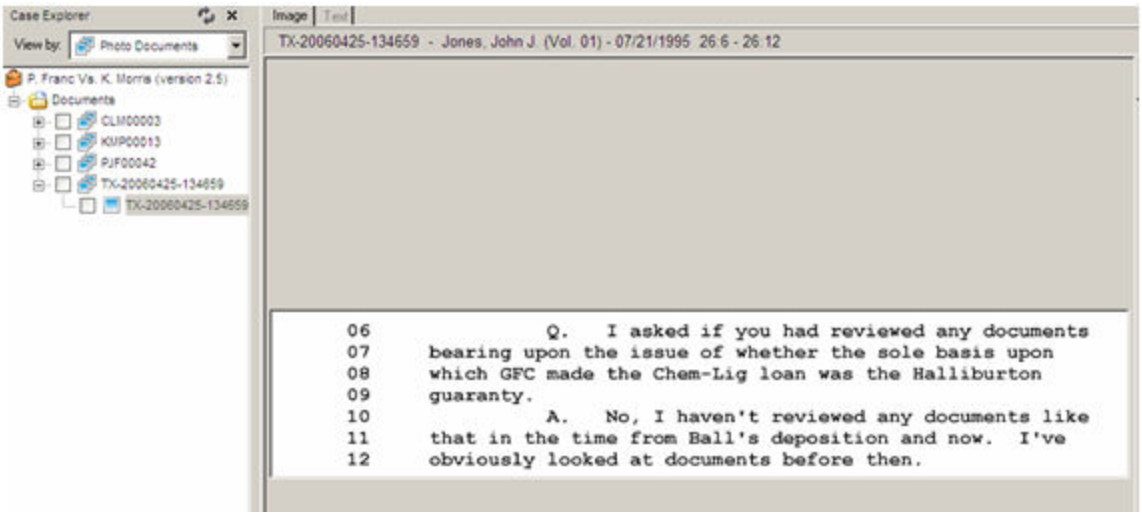

00026
01 issue of whether the sole basis upon which GFC made the
02 Chem-Lig loan was the Halliburton guaranty?
03 A. No.
04 You're asking me if I've reviewed any of
05 those documents that relate to that issue, right?
06 Q. I asked if you had reviewed any documents
07 bearing upon the issue of whether the sole basis upon
08 which GFC made the Chem-Lig loan was the Halliburton
09 guaranty.
10 A. No,
11 that in the time
12 obviously looke
13 Q. Sinc
14 any discussions
15 internal memor
16 Halliburton gua
17 transaction wa
18 restructured?
19 A. I di
20 What memoran
21 Q. Sinc
Copy to Clipboard Ctrl+C
Copy Excerpt into New Note Ctrl+D
Write to digest "Digest"
Copy Excerpt to Outline: To Do
Save Excerpt to: Slideshow
Create Link Alt+L
Search for "06 Q. I asked if you had reviewed any docum"
Add Selected Text to New TrialDirector Clip...
Play Selected Text with TrialDirector
Create TrialDirector Exhibit from Selected Text...
Present Selected Text in TrialDirector

2. Right-click on the highlighted lines of text and select **Create TrialDirector Exhibit from Selected Text**.
3. If you wish, you may change the description of the newly created exhibit or you may leave it as described. Click **OK**.

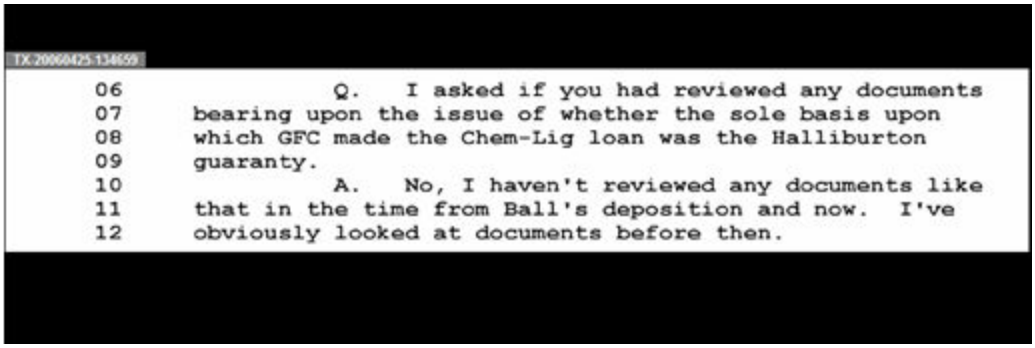

Create Exhibit
To create a TrialDirector Suite exhibit from the selection, please enter the exhibit identifier, and description.
To create the new exhibit, click OK.
To exit without creating a new exhibit, click Cancel.
Exhibit identifier: TX-20060425-134659
Description:
Jones, John J. (Vol. 01) - 07/21/1995 26:6 - 26:12
OK
Cancel

4. The excerpt now appears in TrialDirector's Case Explorer as a bitmap image.

   Tip: You can quickly locate these excerpts by selecting Photo Documents from the View By: drop-down list at the top of TrialDirector's Case Explorer.


Case Explorer
View by: Photo Documents
P. Franc Vs. K. Morris (version 2.5)
Documents
CLM00003
KMP00013
PJF00042
TX-20060425-134659
TX-20060425-134659
Image
TX-20060425-134659 - Jones, John J. (Vol. 01) - 07/21/1995 26:6 - 26:12
06 Q. I asked if you had reviewed any documents
07 bearing upon the issue of whether the sole basis upon
08 which GFC made the Chem-Lig loan was the Halliburton
09 guaranty.
10 A. No, I haven't reviewed any documents like
11 that in the time from Ball's deposition and now. I've
12 obviously looked at documents before then.

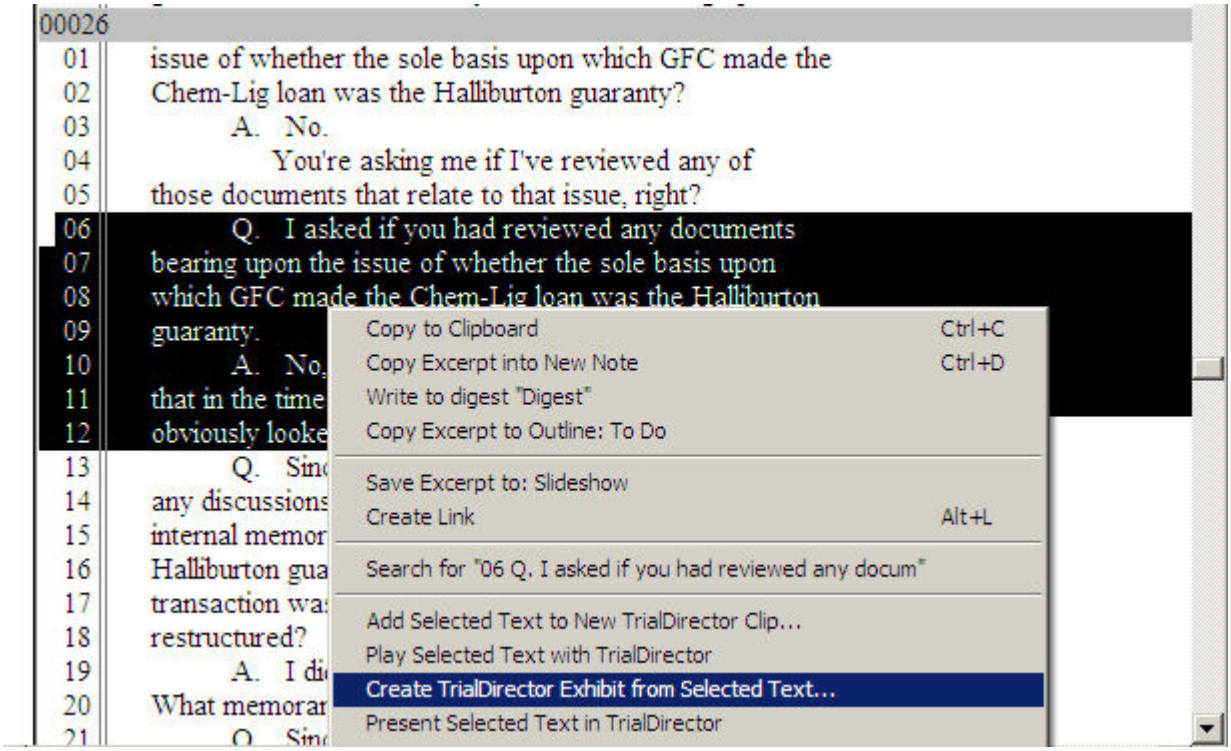
   In Presentation Mode, the excerpt appears as follows:


TX-20060425-134659
06 Q. I asked if you had reviewed any documents
07 bearing upon the issue of whether the sole basis upon
08 which GFC made the Chem-Lig loan was the Halliburton
09 guaranty.
10 A. No, I haven't reviewed any documents like
11 that in the time from Ball's deposition and now. I've
12 obviously looked at documents before then.

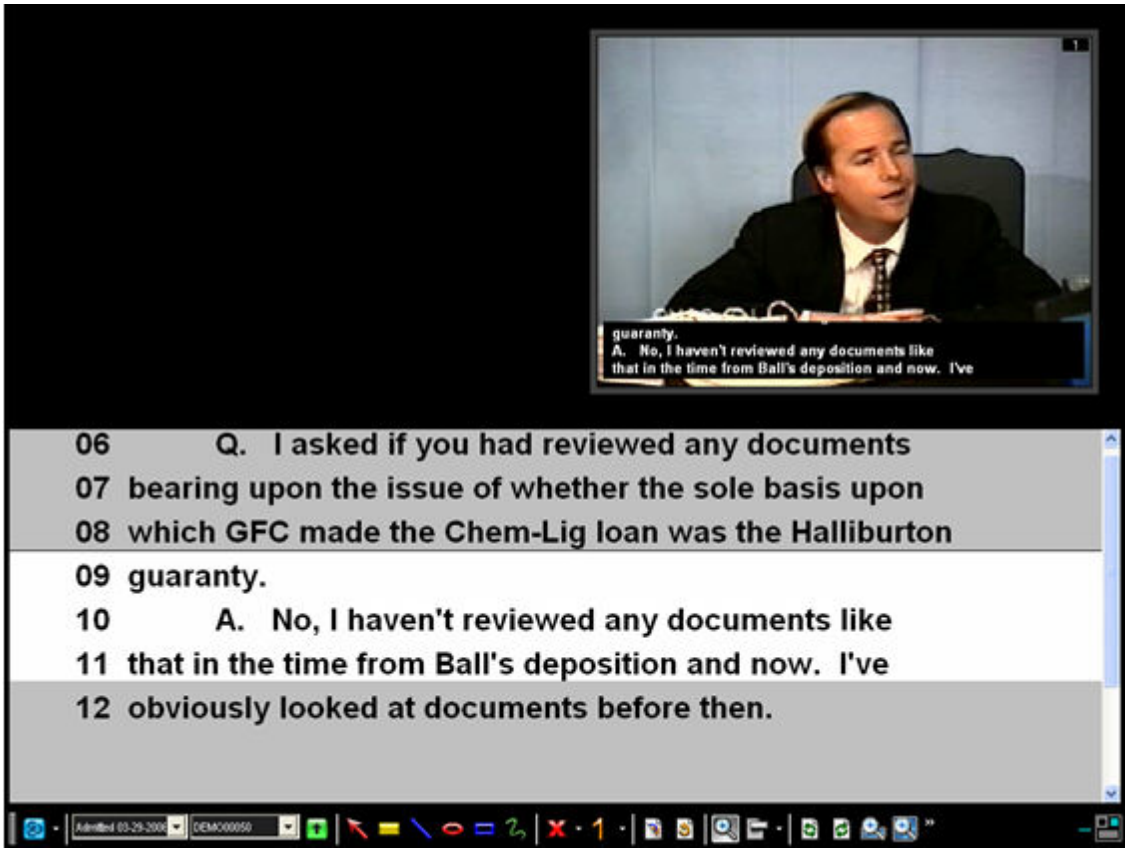
Presenting Testimony Directly from Enterpise/iBlaze

Typically, you would run TrialDirector separately from Enterprise/iBlaze in the courtroom. But you may find, on occasion, that you need to quickly present testimony directly from Enterprise or iBlaze.

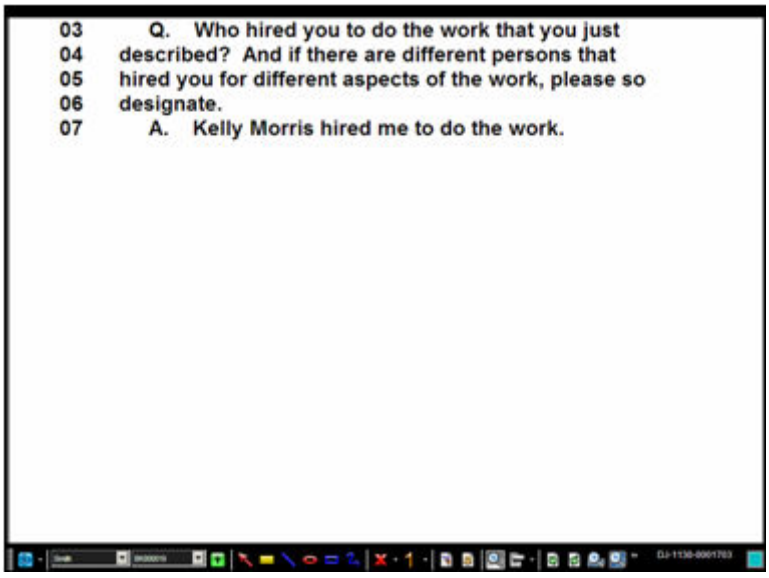
1. Open the transcript you wish to work with, and highlight the lines of testimony you want to present.
2. Right-click on the highlighted lines and select **Present Selected Text in TrialDirector** from the menu. TrialDirector's Presentation screen opens on your desktop displaying the selected testimony.


00026
01 issue of whether the sole basis upon which GFC made the
02 Chem-Lig loan was the Halliburton guaranty?
03 A. No.
04 You're asking me if I've reviewed any of
05 those documents that relate to that issue, right?
06 Q. I asked if you had reviewed any documents
07 bearing upon the issue of whether the sole basis upon
08 which GFC made the Chem-Lig loan was the Halliburton
09 guaranty.
10 A. No,
11 that in the time
12 obviously looke
13 Q. Sinc
14 any discussions
15 internal memor
16 Halliburton gua
17 transaction wa:
18 restructured?
19 A. I di
20 What memorar
Copy to Clipboard Ctrl+C
Copy Excerpt into New Note Ctrl+D
Write to digest "Digest"
Copy Excerpt to Outline: To Do
Save Excerpt to: Slideshow
Create Link Alt+L
Search for "06 Q. I asked if you had reviewed any docum"
Add Selected Text to New TrialDirector Clip...
Play Selected Text with TrialDirector
Create TrialDirector Exhibit from Selected Text...
Present Selected Text in TrialDirector

If video is associated with the transcript, then the video plus scrolling text will be displayed. (These settings may be adjusted in TrialDirector's Presentation Options. See Help Topic Presentation Options for more information.)


guaranty.
A. No, I haven't reviewed any documents like
that in the time from Ball's deposition and now. I've
06 Q. I asked if you had reviewed any documents
07 bearing upon the issue of whether the sole basis upon
08 which GFC made the Chem-Lig loan was the Halliburton
09 guaranty.
10 A. No, I haven't reviewed any documents like
11 that in the time from Ball's deposition and now. I've
12 obviously looked at documents before then.

If no video is associated with the transcript, then the text appears in TrialDirector's Presentation mode as shown here:

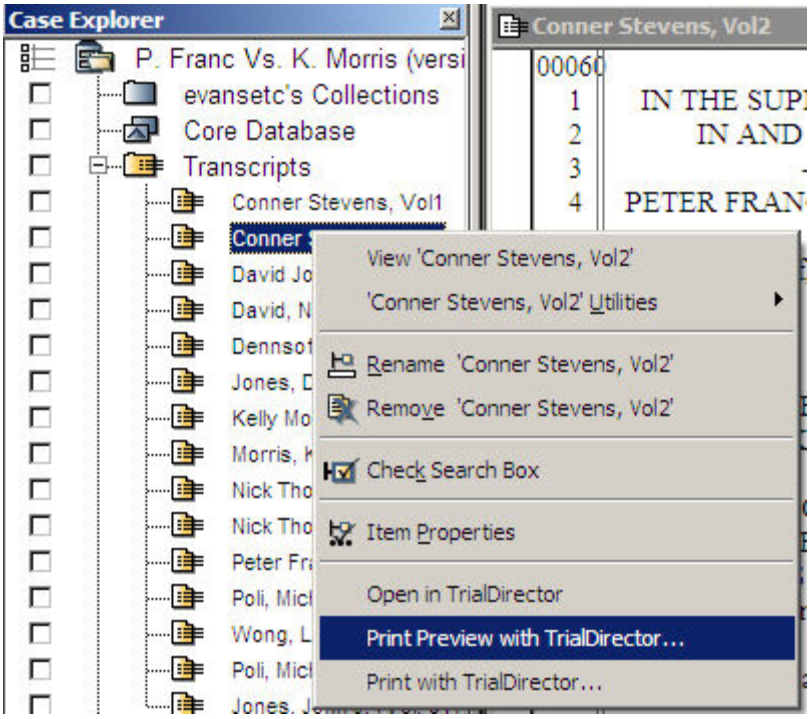

03 Q. Who hired you to do the work that you just
04 described? And if there are different persons that
05 hired you for different aspects of the work, please so
06 designate.
07 A. Kelly Morris hired me to do the work.

Printing from Enterprise/iBlaze using TrialDirector's Printing Tools

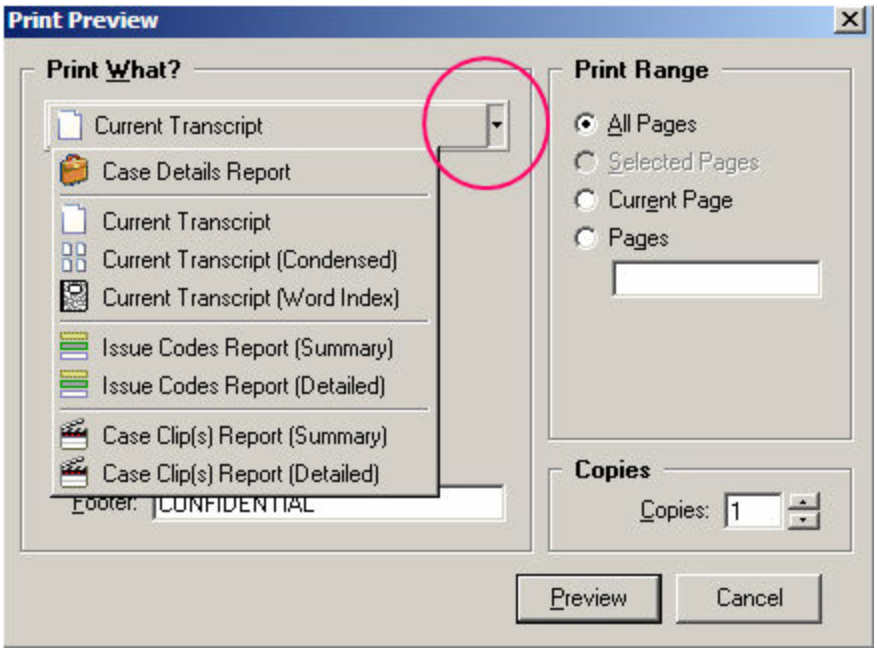
Although you can print transcripts using the printing tools in Enterprise/iBlaze, you may find that TrialDirector's Printing features offer you more options. For example, you may wish to print a transcript in "condensed format," that is, multiple pages per single printed sheet. TrialDirector lets you do that. You can also print the Word Index for those words associated with a transcript. Although you can print a transcript's vocabulary in Enterprise/iBlaze, TrialDirector will let you include the page:line references.

To Print an Enterprise/iBlaze Transcript in TrialDirector

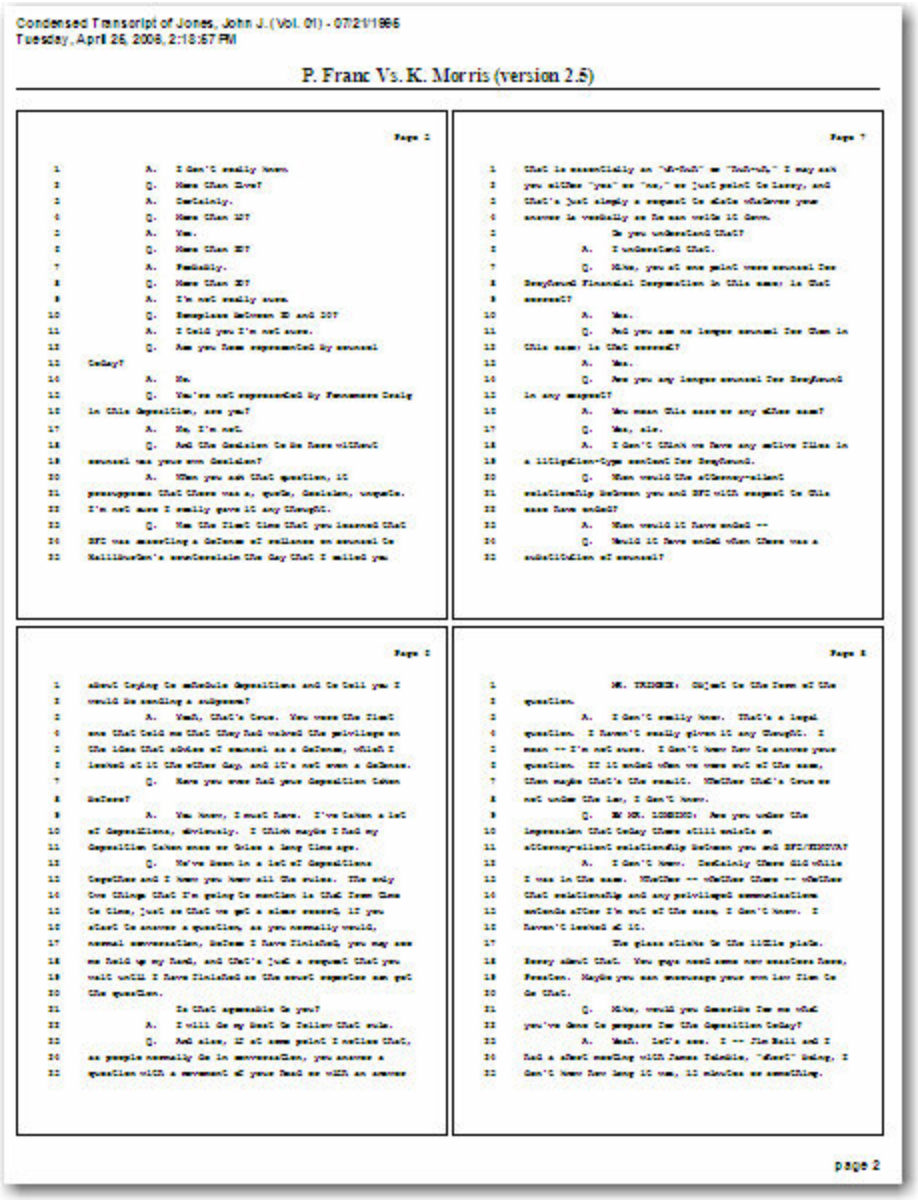
1. Right-click on the transcript name in the Enterprise/iBlaze Case Explorer window.
2. Select either **Print Preview with TrialDirector** or **Print with TrialDirector** from the menu.



3. TrialDirector's printing options dialog opens. Click on the drop-down arrow to view the printing choices.



An example of TrialDirector's Condensed Transcript Format:


Condensed Transcript of Jones, John J. (Vol. 01) - 07/21/1866
Tuesday, April 26, 2008, 2:18:57 PM

P. Franc Vs. K. Morris (version 2.5)

Page 2

A. I don't really know.
Q. Have them three?
A. Certainly.
Q. Have them 12?
A. Yes.
Q. Have them 20?
A. Probably.
Q. Have them 30?
A. I'm not really sure.
Q. Someplace between 20 and 30?
A. I told you I'm not sure.
Q. Are you been represented by counsel today?
A. No.
Q. You've not represented by Paracomore Craig in this Deposition, are you?
A. No, I'm not.
Q. And the decision to be here without counsel was your own decision?
A. When you ask that question, it presupposes that there was a, quote, decision, unquote. I'm not sure I really gave it any thought.
Q. Was the first time that you learned that BFC was asserting a defense of reliance on counsel to Halliburton's overcharging the day that I mailed you

Page 7

that is essentially an "all-call" or "fish-in." I may ask you either "yes" or "no," or just point to Larry, and that's just simply a request to state whatever your answer is verbally as he can write it down.
Do you understand that?
A. I understand that.
Q. Mike, you at one point were counsel for Braytarg Financial Corporation in this case; is that accurate?
A. Yes.
Q. And you are no longer counsel for them in this case; is that accurate?
A. Yes.
Q. Are you any longer counsel for Braytarg in any respect?
A. You mean this case or any other case?
Q. Yes, sir.
A. I don't think we have any active files in a litigation-type context for Braytarg.
Q. When would the attorney-client relationship between you and BFC with respect to this case have ended?
A. When would it have ended --
Q. Would it have ended when there was a substitution of counsel?

Page 3

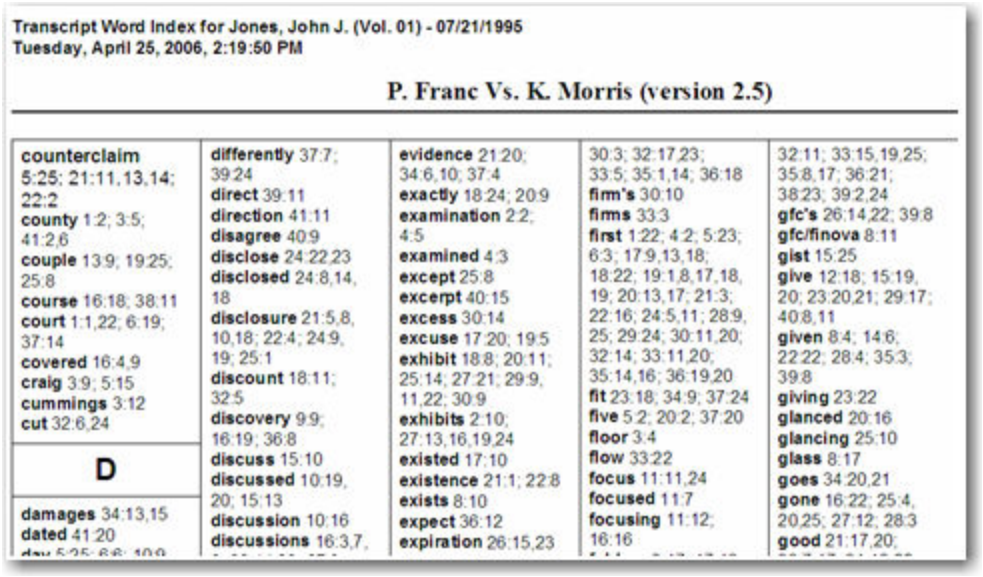
about trying to schedule depositions and to tell you I would be sending a subpoena?
A. Yeah, that's true. You were the first one that told me that they had waived the privilege on the idea that advice of counsel as a defense, which I looked at it the other day, and it's not even a defense.
Q. Have you ever had your deposition taken before?
A. You know, I must have. I've taken a lot of depositions, obviously. I think maybe I had my deposition taken once or twice a long time ago.
Q. We've been in a lot of depositions together and I know you know all the rules. The only two things that I'm going to mention is that from time to time, just so that we get a clean record, if you start to answer a question, as you normally would, normal conversation, before I have finished, you may see me hold up my hand, and that's just a request that you wait until I have finished so the court reporter can get the question.
Is that agreeable to you?
A. I will do my best to follow that rule.
Q. And also, if at some point I notice that, as people normally do in conversation, you answer a question with a movement of your head or with an answer

Page 4

MR. TRIDENT: Object to the form of the question.
A. I don't really know. That's a legal question. I haven't really given it any thought. I mean -- I'm not sure. I don't know how to answer your question. If it ended when we were out of the room, then maybe that's the result. Whether that's true or not under the law, I don't know.
BY MR. DEMING: Are you under the impression that today there still exists an attorney-client relationship between you and BFC/HIGHTAT
A. I don't know. Certainly there did while I was in the room. Whether -- whether there -- whether that relationship and any privileged communications outside after I'm out of the room, I don't know. I haven't looked at it.
The glass sliders in the lobby pick. Every about that. You guys need some new associates here, Preston. Maybe you can encourage your son Lee Jim to do that.
Q. Mike, would you describe for me what you've done to prepare for the deposition today?
A. Yeah. Let's see. I -- Jim Hall and I had a short meeting with James Tolmble, "Albert" today. I don't know how long it was, 15 minutes or something.

page 2

An example of TrialDirector's printed Word Index:



Transcript Word Index for Jones, John J. (Vol. 01) - 07/21/1995
Tuesday, April 25, 2006, 2:19:50 PM

P. Franc Vs. K. Morris (version 2.5)

counterclaim 5:25; 21:11,13,14; 22:2
county 1:2; 3:5; 41:2,6
couple 13:9; 19:25; 25:8
course 16:18; 38:11
court 1:1,22; 6:19; 37:14
covered 16:4,9
craig 3:9; 5:15
cummings 3:12
cut 32:6,24

D

damages 34:13,15
dated 41:20

differently 37:7; 39:24
direct 39:11
direction 41:11
disagree 40:9
disclose 24:22,23
disclosed 24:8,14, 18
disclosure 21:5,8, 10,18; 22:4; 24:9, 19; 25:1
discount 18:11; 32:5
discovery 9:9; 16:19; 36:8
discuss 15:10
discussed 10:19, 20; 15:13
discussion 10:16
discussions 16:3,7,

evidence 21:20; 34:6,10; 37:4
exactly 18:24; 20:9
examination 2:2; 4:5
examined 4:3
except 25:8
excerpt 40:15
excess 30:14
excuse 17:20; 19:5
exhibit 18:8; 20:11; 25:14; 27:21; 29:9, 11,22; 30:9
exhibits 2:10; 27:13,16,19,24
existed 17:10
existence 21:1; 22:8
exists 8:10
expect 36:12
expiration 26:15,23

30:3; 32:17,23; 33:5; 35:1,14; 36:18
firm's 30:10
firms 33:3
first 1:22; 4:2; 5:23; 6:3; 17:9,13,18; 18:22; 19:1,8,17,18, 19; 20:13,17; 21:3; 22:16; 24:5,11; 28:9, 25; 29:24; 30:11,20; 32:14; 33:11,20; 35:14,16; 36:19,20
fit 23:18; 34:9; 37:24
five 5:2; 20:2; 37:20
floor 3:4
flow 33:22
focus 11:11,24
focused 11:7
focusing 11:12; 16:16

32:11; 33:15,19,25; 35:8,17; 36:21; 38:23; 39:2,24
gfc's 26:14,22; 39:8
gfc/finova 8:11
gist 15:25
give 12:18; 15:19, 20; 23:20,21; 29:17; 40:8,11
given 8:4; 14:6; 22:22; 28:4; 35:3; 39:8
giving 23:22
glanced 20:16
glancing 25:10
glass 8:17
goes 34:20,21
gone 16:22; 25:4, 20,25; 27:12; 28:3
good 21:17,20;

More Information:

- CT Summation Enterprise/iBlaze Integration
- Sharing Images with CT Summation Enterprise/iBlaze

Application Integration - Microsoft Access Integration

Microsoft Access Integration

The ability to link to a Microsoft Access database via a DDE (Dynamic Data Exchange) is one of the many tools that you can take advantage of as a user of TrialDirector.

Establishing Link

Locate the ***DDE.mdb*** file, located in the ***\support\dde\access*** folder on the TrialDirector CD. Open the *Table1* form in Access, which will demonstrate a basic DDE link with Access. The case items contained within this database pertain to the TrialDirector Demo Case. Clicking on the navigation buttons on the bottom of the form will display the associated item in the Document Manager.

Displaying the *Table1* form in Design Mode will reveal the DDE commands used to establish the link between Access and TrialDirector. The DDE commands are listed below:

=DDESend("TrialDirector","DDImage","TxtDde",[Document ID])

Using Microsoft Access with TrialDirector

Microsoft Access users can maintain their case information using a custom, in-house database while able to still use the features of TrialDirector. The Document IDs used in the MS Access database and the TrialDirector Case Explorer must match in order for the DDE commands to properly function. Running both applications will allow users to navigate through document information via an Access form and display the corresponding image in TrialDirector.

More Information:

- Document Manager

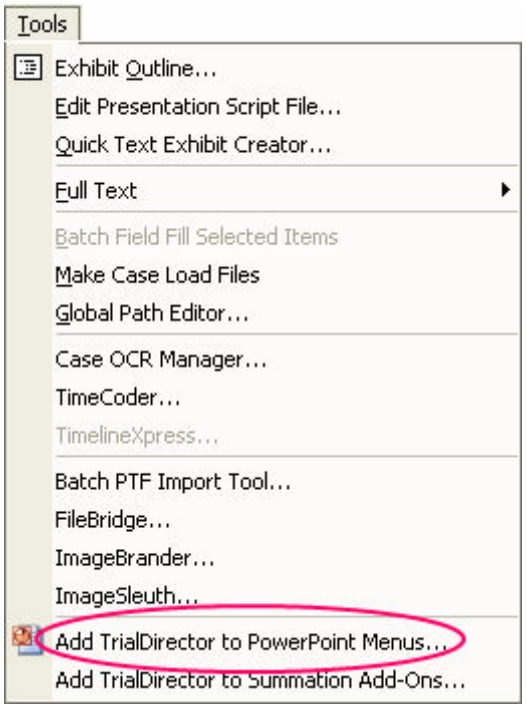
TrialDirector PowerPoint Plug-in

TrialDirector gives you the ability to embed a live TrialDirector session in PowerPoint presentations. This will make PowerPoint a more flexible and stronger presentation tool. You can have multiple slides with your important points, and then have portions of those slides with the TrialDirector control embedded.

Configuring PowerPoint

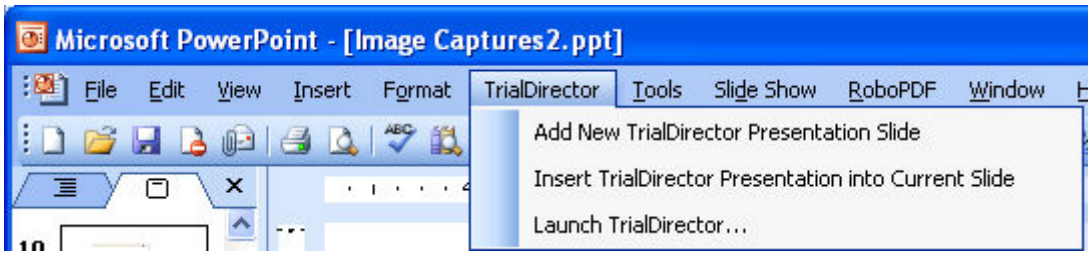
The first step in using TrialDirector within PowerPoint is to configure the connection between the two applications.

1. Open TrialDirector. (PowerPoint should be closed.)
2. From the Tools menu, select the **Add TrialDirector to PowerPoint Menus...** command.



3. When the plug-in has been installed, the following message will display. Click **OK** to close the message.

4. Open PowerPoint. A TrialDirector menu will appear in the PowerPoint menu bar as shown below.

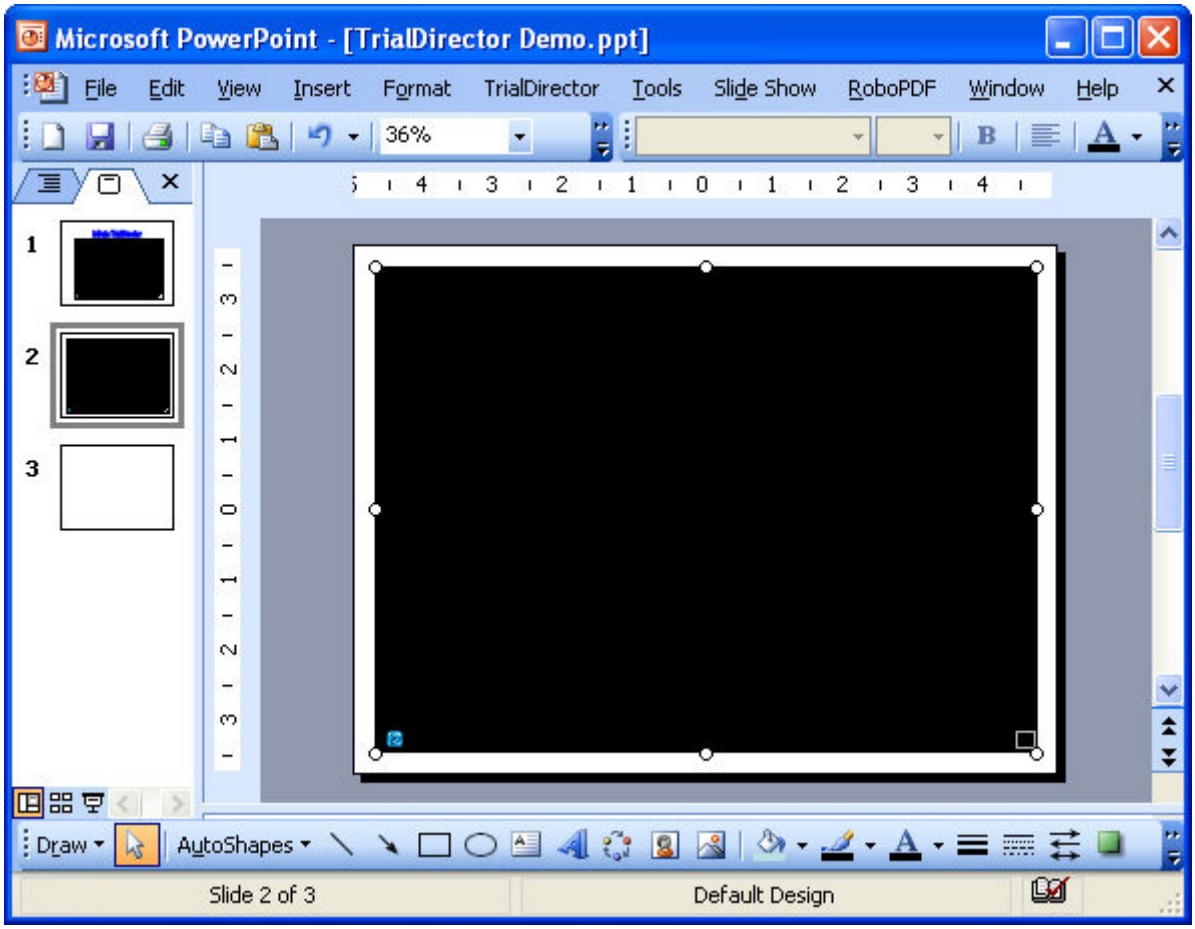


Incorporating TrialDirector into PowerPoint

To create a PowerPoint presentation with TrialDirector embedded, follow the steps listed below.

1. Launch PowerPoint
2. Open the desired Presentation or create a New Presentation.
3. Select the slide that will contain the TrialDirector window. From the TrialDirector menu in PowerPoint, select **Insert TrialDirector Presentation into Current Slide**.

4. A TrialDirector Presentation window will appear in your desired slide. You can leave the TrialDirector window at it's full size or resize it to use only a portion of the PowerPoint slide. You can place TrialDirector windows on as many slides as desired.


Microsoft PowerPoint - [TrialDirector Demo.ppt]
File Edit View Insert Format TrialDirector Tools Slide Show RoboPDF Window Help
36%
Draw AutoShapes
Slide 2 of 3
Default Design

5. Save your Presentation with the TrialDirector window(s) placed as desired.
6. Run the PowerPoint Slide Show using PowerPoint commands.
7. When you have reached a slide with TrialDirector in it, you can load exhibits into the slide with all of TrialDirector's functionality. You do not have to separately launch TrialDirector, since the active TrialDirector Presentation window can make any necessary calls to TrialDirector data.

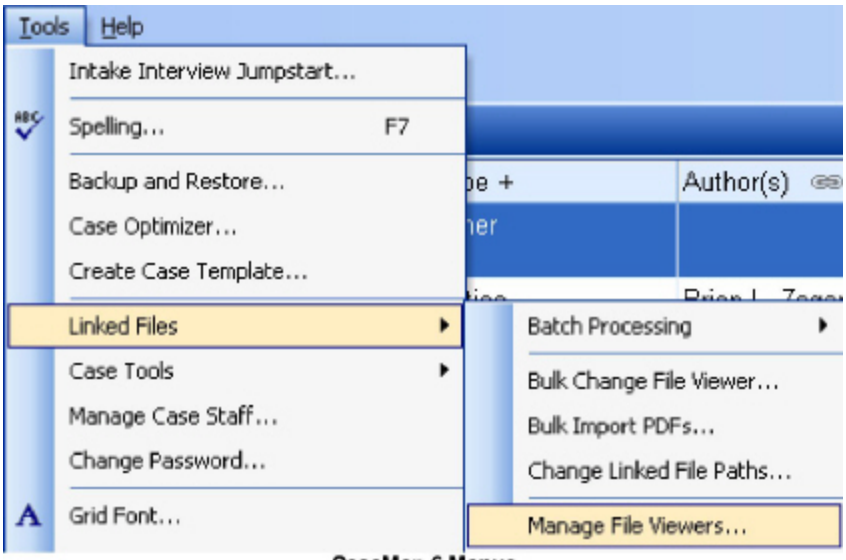
More Information:

- Presentation Display
- Control the Presentation Display
- Presentation Toolbar

Configuring TrialDirector as the Default CaseMap Image Viewer

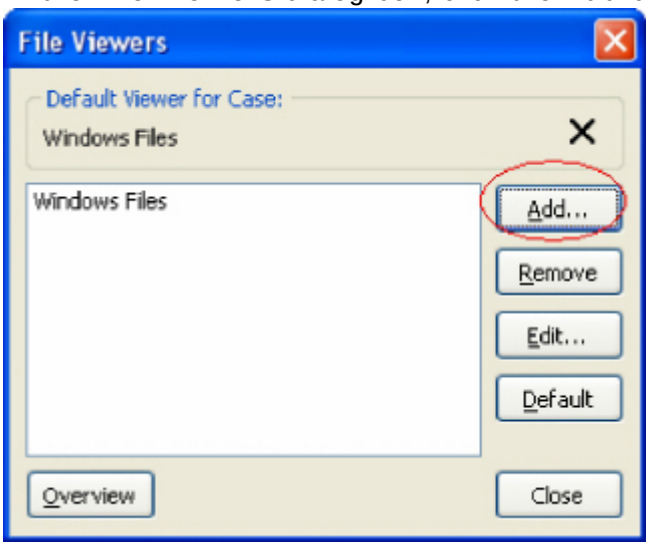
To set TrialDirector as the default file viewer in CaseMap, follow the instructions below.

1. In CaseMap, click the **Tools** menu. Point to **Linked Files**, and click **Manage File Viewers**.

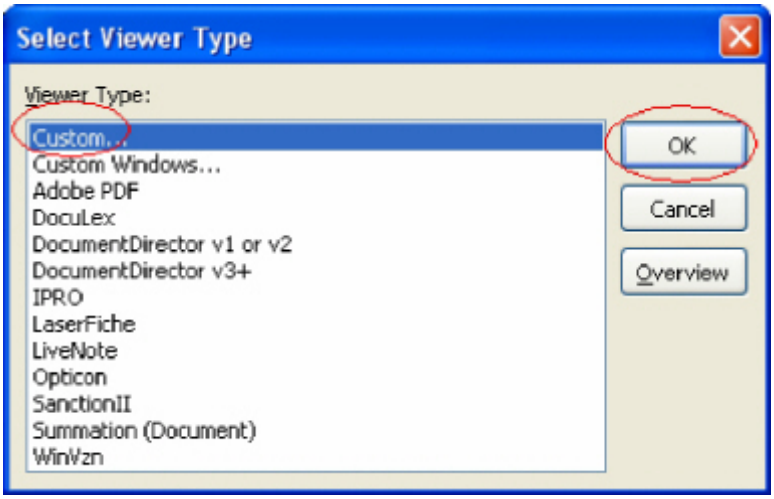


CaseMap 6 Menus

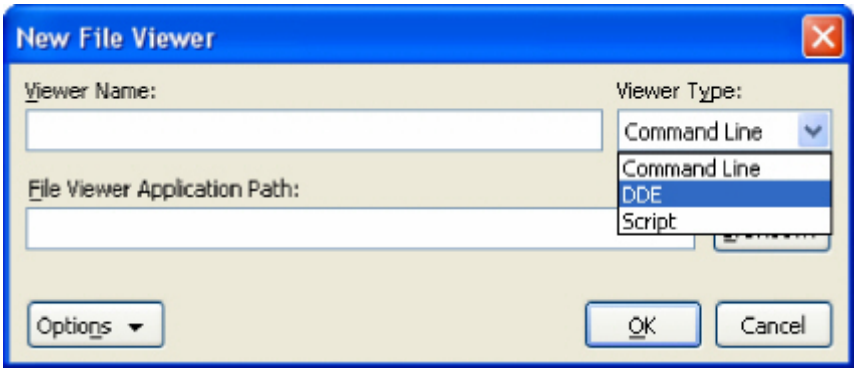
2. In the **File Viewers** dialog box, click the **Add** button.



3. In the **Select Viewer Type** dialog box, select **Custom** and click **OK**.

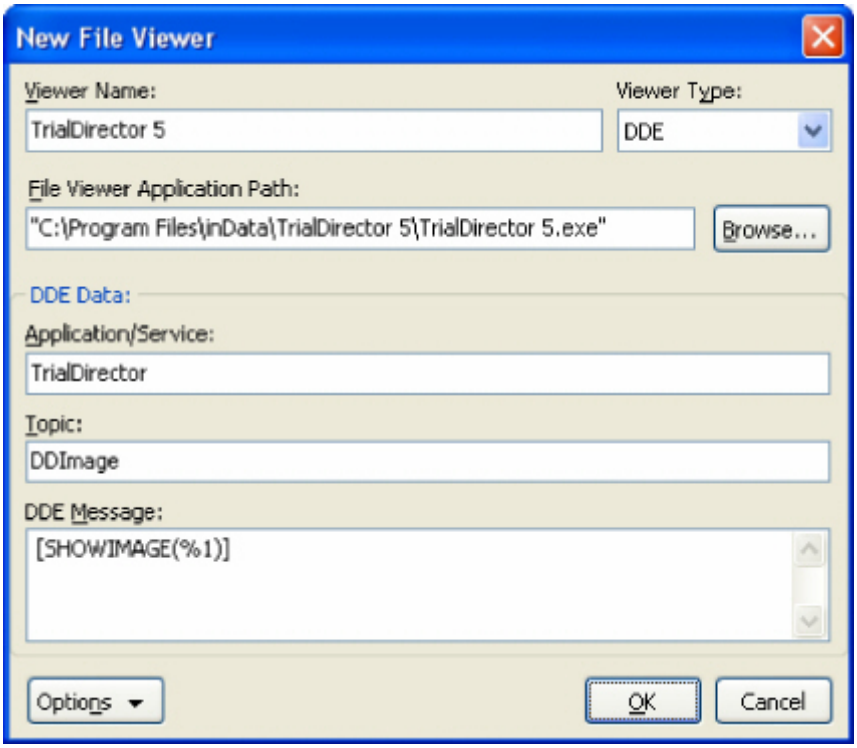


4. In the **New File Viewer** dialog box, under **Viewer Type**, select **DDE**.

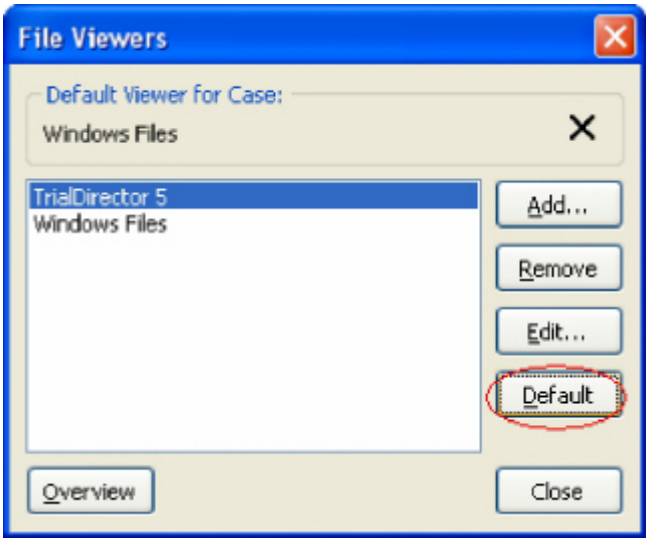


Once DDE is selected as the Viewer Type, additional fields appear.

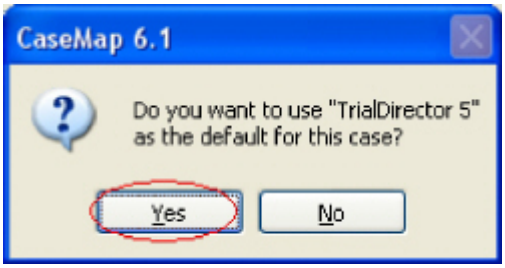
5. Complete the **New File Viewer** dialog box as shown below. Browse to the location where TrialDirector is currently installed. The example below shows the default installation path for a single user license of TrialDirector 5.x. If you have TrialDirector 5.x installed to a network server location, browse to the UNC path (ex. \\Server\Share\Apps\inData\TrialDirector 5.exe) for the TrialDirector application.



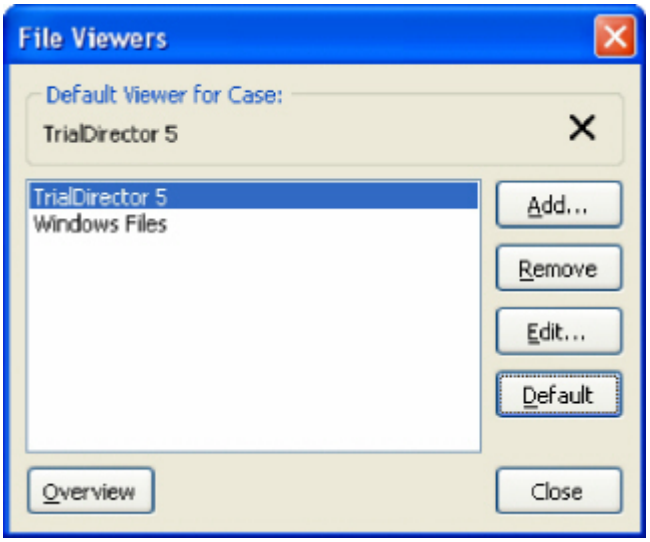
6. Once the file viewer has been configured, click **OK** to save the changes and return to the File Viewers dialog box.
7. Now that the File Viewer has been created, it must be set as the default viewer for the current case. Select **TrialDirector 5** from the list of viewers and click the **Default** button.



8. Click **Yes** to confirm TrialDirector 5 as the default viewer.



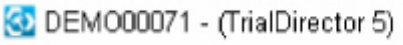
9. "TrialDirector 5" is now displayed as the default viewer for the case. Click **Close** to return to CaseMap.



10. This TrialDirector icon is now associated with the CaseMap items:
Now it is imperative to set the CaseMap **Linked File** field to reflect the **Item ID** of the TrialDirector record and NOT the actual path to the file. When using DDE to show an image in TrialDirector, the Item ID is used to display the image and NOT the path

and filename of that image. For example, a CaseMap Linked File entry of DEMO00071 will properly display the image (assuming it is loaded into the current TrialDirector case), while entering the complete path to the image (E:\Sample Data\Docs\001\DEMO00071.TIF) will NOT display the image in TrialDirector.

Correct Linked File Entry



Incorrect Linked File Entry

11. Next, ensure that the CaseMap items properly match the Item IDs within the current TrialDirector case. Once this step is complete, select the CaseMap record you want to view and use the F9 key to display the image in TrialDirector.

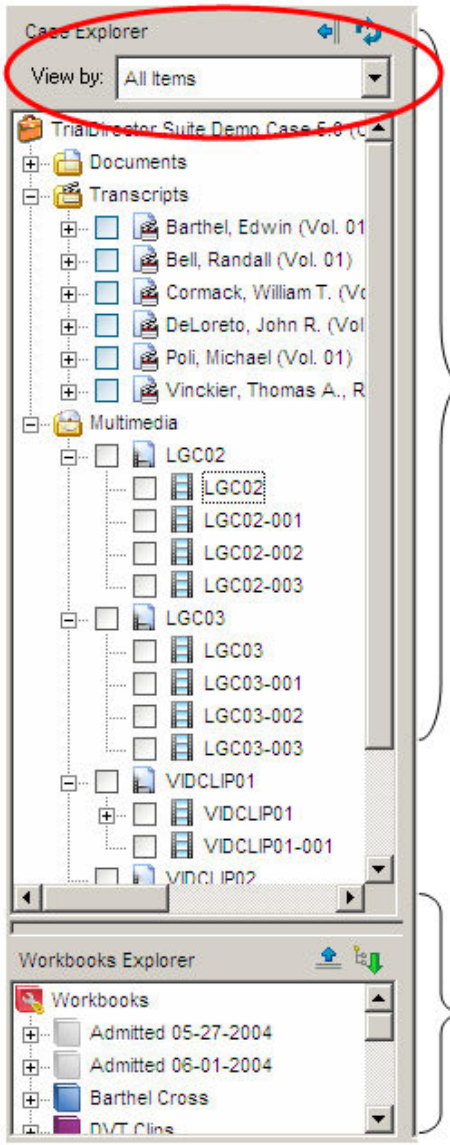
Note: If you use the sample CaseMap case that corresponds to the TrialDirector 5 Sample Case, then the Default Image Viewer is already configured and all of the CaseMap records reflect the corresponding TrialDirector Item ID.

Case Library

The Case Library

The Case Library provides an overview of all the documents, photos, transcripts, and videos contained in your case. You can see the complete list in the Case Explorer pane on the left side, and view items in the large viewing pane on the right side. A key feature of this tab is the Workbooks Explorer. You use workbooks to organize and collect crucial exhibits for trial, such as trial notebooks, motion folders, or other organization aids.

It's important to note that the Case Library is used only for viewing and organizing exhibit items, not for working on them. Workbooks are created in the Case Library, but the exhibits that populate the workbooks are only annotated or customized from the Document Manager or Transcript manager tabs.



The **Case Library** consists of the ***Case Explorer*** and the ***Workbooks Explorer***.

At the top of the **Case Explorer** is a listing of all of the items in your case, organized by categories:

- ***Documents*** (including images, photographs and native files)
- ***Transcripts*** (including text only and video synchronized transcripts)
- ***Multimedia*** files (including animations)

To view particular categories of items, click on the pull-down arrow next to the **View By:** window and select the category you want to view.

At the bottom is the **Workbooks Explorer.** When you first start a case in TrialDirector, three workbooks appear in this section:

- ***Search Results***
- ***Trial Exhibits***
- ***Witnesses***

You can create additional workbooks, too, for opening and closing arguments, individual witnesses, or any other category you want. TrialDirector creates some for you as you work with your exhibits. For example, add a number to the Trial Ex. Field for one of your items, and a reference to that item is added to the Trial Exhibits Workbook. During trial, as you identify admitted exhibits, a new Admitted Workbook appears for each trial day.

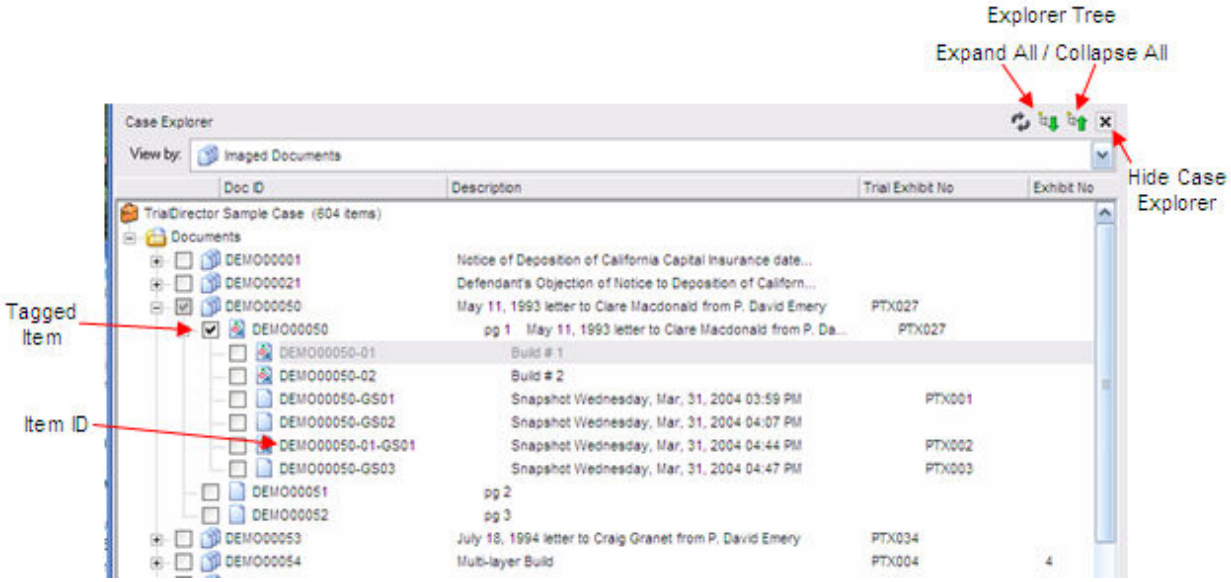
More Information:

- Workbooks
- Exhibit Management
- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case

Case Explorer

Case Explorer represents the database that is used to organize all document exhibits associated with a case. To expand Case Explorer to use the full window, click the **Show/Hide Item Viewer** button:

The following diagram shows some of the features in Case Explorer:



Editing the Document Description (Properties)

If needed, you can add or modify the description displayed in the Case Explorer using either of the following methods:

- Open the pop-up column editor
- Open the Item Properties dialog box

To open the pop-up editor:

1. Click to select the desired document, then right-click and select **Edit**. (You can also select the desired item and click the F2 key.)

The pop-up editor appears.

2. Select the information in any column and edit it. Changes are saved automatically. Use the mouse or tab key to move between columns.

   Note: If you edit the Description or the Trial Exhibit No. here, TrialDirector will update this information in the Coding database also.
3. To edit the information for another document, use the up and down arrow keys to move between documents.

   Note: The arrow keys move through the explorer grid based on the way that you are viewing. For example, if you have a document expanded to display the individual pages, the pop-up editor will move from page to page. If a document is not expanded, the pop-up editor will jump to the next document.

To edit from the Item Properties window:

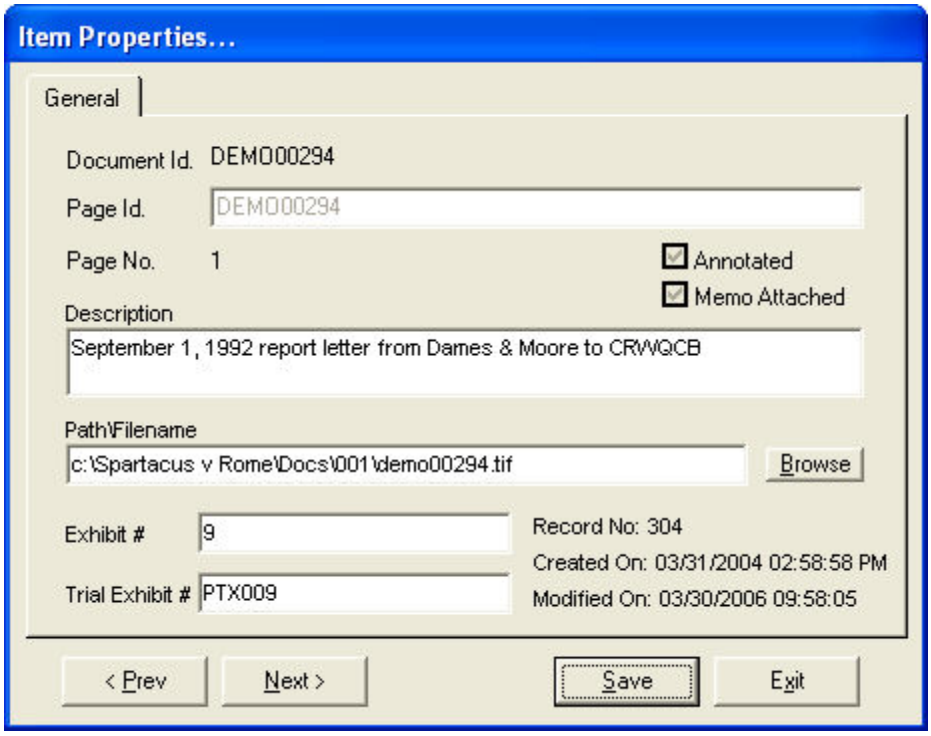
1. Click to select the desired document, then right-click and select **Item Properties**.
2. The Description, Path\Filename, Exhibit #, and Trial Exhibit # boxes are all editable.

   Note: *If* you edit the Description or the Trial Exhibit # here, TrialDirector will update this information in the Coding database also.
3. You can move to the previous or next documents in the Case Explorer by clicking **Prev** or **Next**. (Edits are automatically saved as you click **Prev** or **Next**.)

   Note: The **Prev** or **Next** buttons move through the explorer grid based on the way that you are viewing. For example, if you have a document expanded to display the individual pages, the Item Properties will move from page to page within the document. If a document is not expanded, the Item Properties will jump to the next document.

4. When you're finished, click **Save** to save your changes and close the window, or **Exit** to close the window without saving.

   Note: Since changes are automatically saved as you click **Prev** or **Next**, the **Save** and **Exit** options only apply to the last Item Properties dialog box.



More Information:

- Filter Case Explorer by File Type
- View Case Items

View Case Items

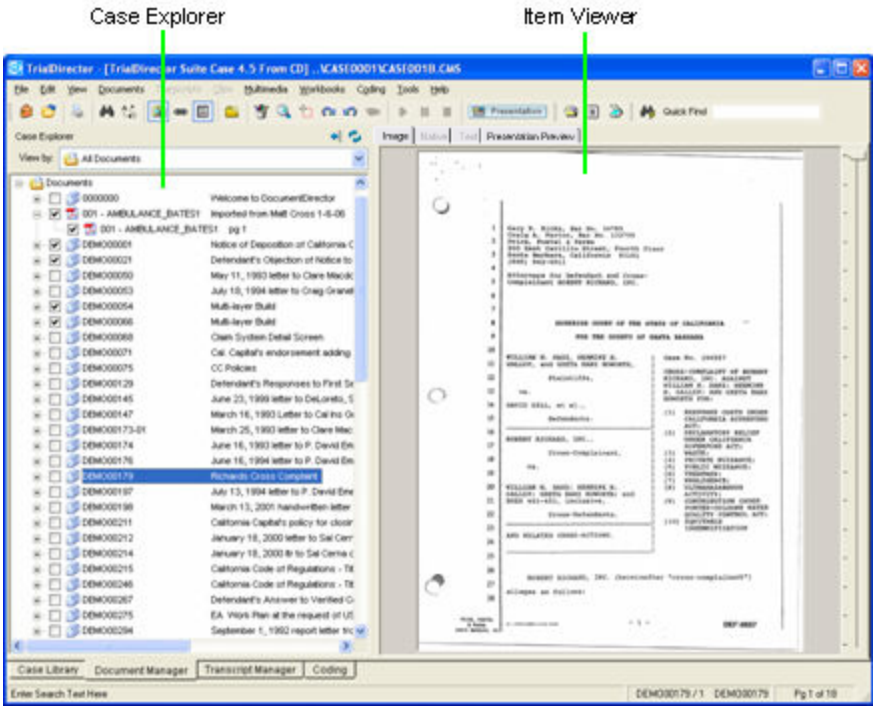
When you are working in the Case Library or Document Manager and select an item in the Case Explorer, the Item Viewer displays it on the right side of the screen. You can also view items when you work in the Coding module.

Depending on the type of item, one or more of the following tabs are available at the top of the Item Viewer:

- **Image** tab - Displays any supported image file and enables you to annotate the image.
- **Native** tab - Opens the program used to create the file and displays the fully functional version of the file within TrialDirector. This tab is unavailable (grayed out) if native viewing is not supported for the file type, or if the program used to create the file is not installed on your computer.

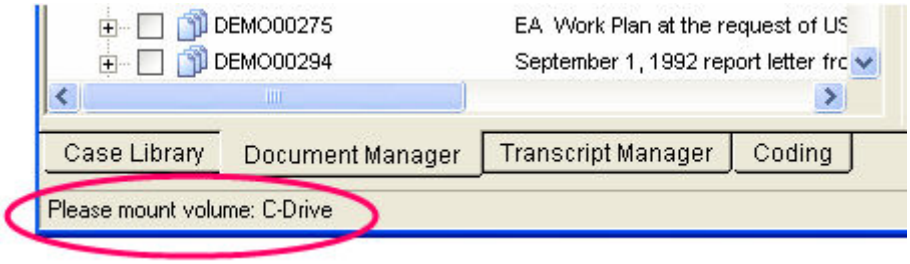
- **Text** tab - Displays full-text OCR for files that were scanned. Use this tab to edit the text if needed.
- **Presentation Preview** tab (Case Library Only) - Displays the presentation view of the item, where you can prepare and preview on-the-fly enhancements without impacting the actual presentation until you are ready to activate the changes.

Pages from PDF files are displayed both as static images on the **Image** tab (for annotation prior to trial), and as they appear in the fully functional PDF file on the **Native** tab. Many Advanced PDF Support features are available in TrialDirector.



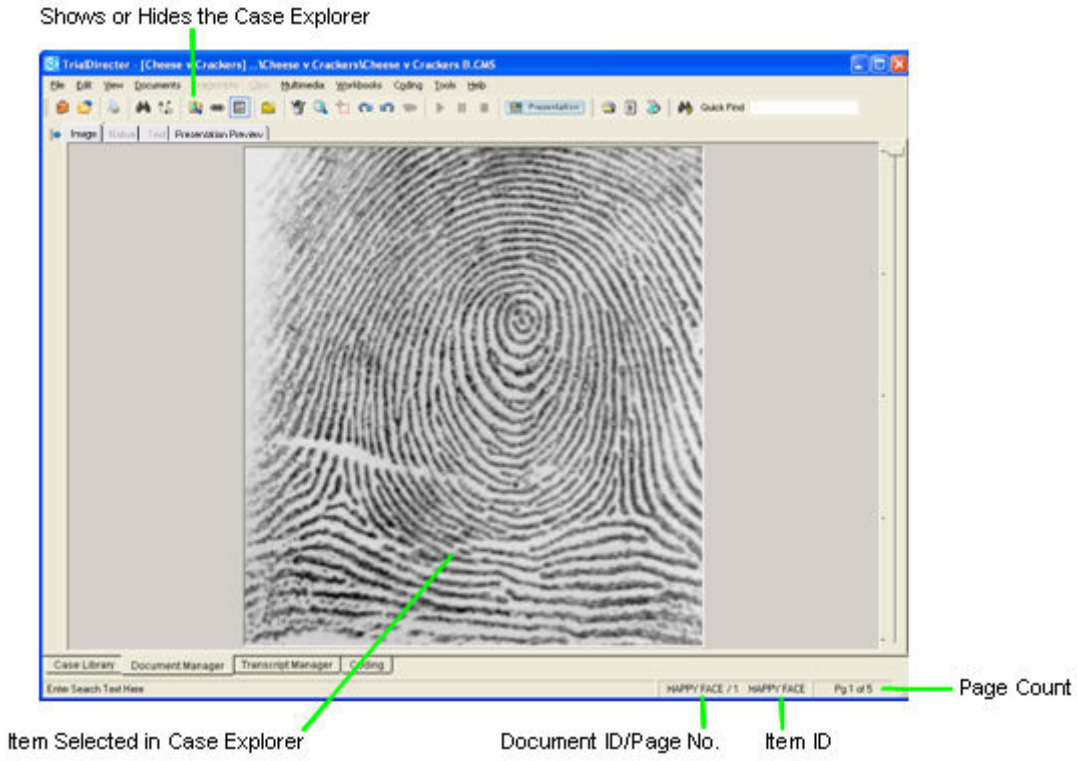
Item is Not Located on Your Computer ("Mount the Volume..." Message)

When you select an item to view and the CD or volume containing the item is not located on your computer, TrialDirector beeps and displays a message in the Status Bar that tells you which volume to load. Mount the correct volume and select the item again.



Full Screen Item Viewer (Hide Case Explorer)

The Item Viewer can be used without the Case Explorer, allowing more room on the desktop for side-by-side image and database exhibit review with a third-party document management system. To use the Item Viewer without the Case Explorer, click the **[Shows or Hides Case Explorer]** button , as shown in the figure below.



When using the Item Viewer alone, you can navigate between items using the **[Page Up]** and **[Page Down]** keys.

What do you want to do?

- Work with Images
- Work with Multimedia Files
- View Native Format (OLE) Files

Working with Workbooks

Topics:

- Create a New Workbook
- Move Items Into a Workbook

- Sort Workbook Contents
- Rearrange Workbook Contents
- Rename a Workbook
- Print Workbook Contents
- Export Workbook Contents to a Script File
- Export Workbook Contents to a Volume
- Apply Current Label to Workbook Items
- Remove a Workbook

In addition to organizing case exhibits using the Document Manager and Transcript Manager Tabs, TrialDirector provides a Workbooks tool that allows you to organize and relate specific groups of items, such as documents or clips related to a particular witness or issue. Note that adding an item to a workbook does not remove it from the Document Manager or Transcript Manager, it simply manages a copy to aid in your trial organization.

By default, TrialDirector creates three workbooks for each case: Search Results, Trial Exhibits, and Witnesses. You can rename these workbooks as desired, and can create as many additional workbooks as necessary. In addition, during trial when documents or clips are admitted in the presentation mode, an Admitted workbook is automatically created. Within the Admitted workbook, a sub-workbook is created and labeled (by date) for each day of trial if exhibits are admitted, and includes all admitted items. Each admitted item is date and time stamped, and includes the item description.

To add items to a workbook, simply open the Case Explorer folder (above the Workbooks Explorer) that contains the item, then click and drag the item to the workbook. The item will be added to the workbook, but will still remain in the original folder.

Note: *Documents are not actually copied to the workbook, the 'copy' in the workbook is just a link to the original. As such, any change made to the original, such as a new annotation, will be reflected in the "copy" in the workbook. However, if a change is made to a document, but the change is saved as new revision, the new revision is NOT reflected in the workbook. (In TrialDirector, the revision is actually a separate document from the original.)*

Create a New Workbook

To add a new workbook, do one of the following:

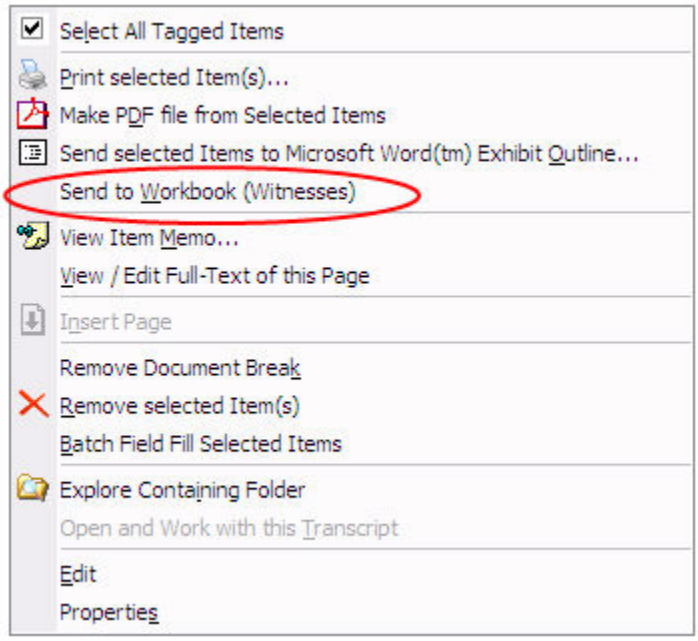
- Click on the **Make New Workbook** icon in the toolbar.
- Select **Create New Workbook** from the Workbooks menu.

A new workbook called **New Workbook** is added to the Workbooks Explorer. You can then rename the new workbook if desired. By default, the new workbook will be available in the Presentation mode. To make the workbook unavailable, right click on it and clear the **Show in Presentation mode** selector.

Move Items into a Workbook

There are two ways to move items to a Workbook:

1. From the Case Library tab, select the item in the Case Explorer and drag the item to the desired workbook.
2. Click on any Workbook to select it, then select items that you would like to add to the workbook (Shift-Click or Alt-Click). Right click on any of the selected items, then select the Send to Workbook command from the shortcut menu.



Note: *You can put the same item in one or more workbooks while still retaining its presence in the Case Explorer. You can also put the same item in a workbook more than once.*

Sort Workbook Contents

There are two options for sorting items in a workbook:

- Manual Sort Order sorts items in the order they were inserted or manually arranged (see Rearrange Workbook Contents below).
- Item ID Sort Order sorts items in alphanumeric order by Item ID.

By default, items in a workbook are sorted in Manual Sort Order.

To sort by Item ID, do one of the following:

- Right-click on the desired workbook and select **Item ID Sort Order** from the drop-down menu.
- Click on the desired workbook and select **Item ID Sort Order** from the Workbooks menu.

To manually sort items, do one of the following:

- Right-click on the desired workbook and select **Manual Sort Order** from the drop-down menu.
- Click on the desired workbook and select **Manual Sort Order** from the Workbooks menu.

Rearrange Workbook Contents

To change the order of items in a workbook, follow these steps:

1. Right-click on the workbook and make sure the Manual Sort Order option is selected (see Sorting Workbook Contents above).
2. Select the item(s) you would like to move and drag them in a new location in the workbook. The item(s) will be inserted before the selected position in the workbook.

Rename a Workbook

1. To rename a workbook, click on the desired workbook to make it active.
2. Do one of the following:
    - Press **[F2]**
    - Right-click on the workbook and select **Rename Workbook** from the drop-down menu
    - Select **Rename Workbook** from the Workbooks menu
3. Type a new workbook name
4. Click on any other workbook in the Workbooks Explorer to save the new name

Print Workbook Contents

To print the contents of a workbook, do one of the following:

- Select a workbook, open the Print window and select Workbook for the Print Range
- Right-click on the desired workbook and select **Print Workbook contents** from the drop-down menu
- Select **Print Workbook contents** from the Workbooks menu

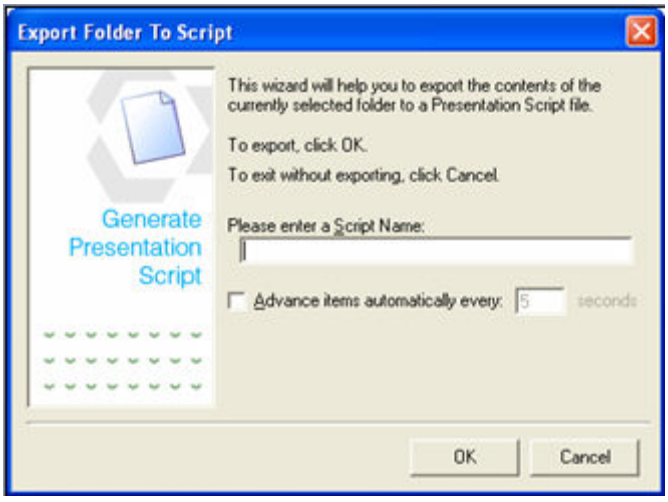
Export Workbook Contents to a Script File

Script files are used in TrialDirector to automate exhibit presentation. When a script file is created from the contents of a workbook, the workbook items are listed in the script file in order, allowing you to present the workbook items sequentially by executing the script.

1. To export the contents of a workbook to a script file, do one of the following:

- Right-click on the desired workbook and select **Send Workbook Contents To Presentation Script...** from the shortcut menu.
- Click on the desired workbook and select **Send Workbook Contents To Presentation Script...** from the Workbooks menu.

2. Enter a name for the script in the **Script Name** field.


Export Folder To Script
This wizard will help you to export the contents of the currently selected folder to a Presentation Script file.
To export, click OK.
To exit without exporting, click Cancel.
Generate Presentation Script
Please enter a Script Name:
Advance items automatically every:
5
seconds
OK
Cancel

3. If you would like the script to advance automatically without having to enter the step script command, select the **Advance Items Automatically Every** Option. Adjust the advancement delay (slide interval) as desired.
4. Click **[OK]**

The script file will be saved in the Scripts folder within the current case folder (for example, C:\Program Files\inData\Cases\Case0000\Scripts).

Export Workbook Contents to a Volume

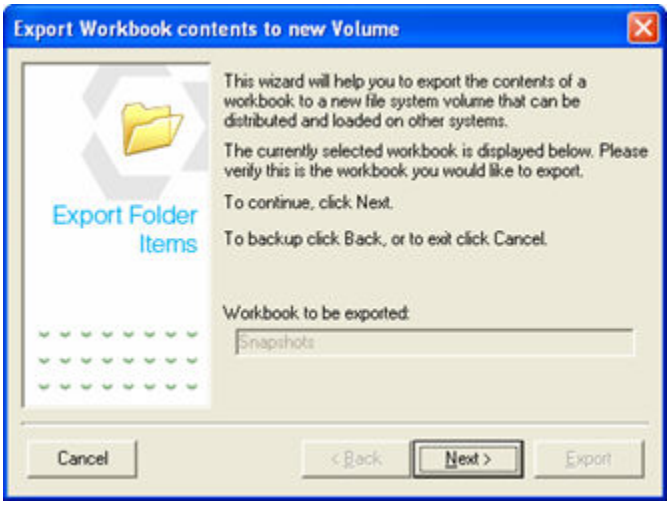
By exporting a workbook, you can make a volume containing the workbook contents. The exported volume will include a load file (*.oll) and a database file (*.mdb) containing all of the items in the folder.

In addition, you can choose to copy all of the source files into the volume folder. This is particularly helpful if the items in your case are located on several different volumes because it saves you from having to switch volumes. For example, you may have a case with a million items spread across 100 volumes, but only 150 of those items will actually be used in trial. By putting those items in a trial workbook and exporting the workbook to a volume, you can create a volume that only contains trial exhibits.

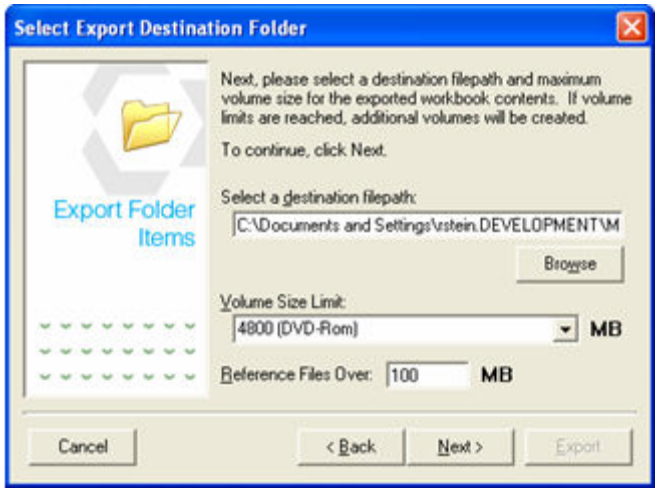
Note: *Memo attachments will only be retained if the database file (*.mdb*) is used to import the volume into a new case instead of the load file (*.oll).*

1. To export a workbook, click on the workbook you want to export to make it active.
2. Do one of the following:

    - Right-click on the workbook and select **Export Workbook Contents To New Volume** from the shortcut menu.
    - Click on the workbook and select **Export Workbook Contents To New Volume** from the Workbooks menu.


Export Workbook contents to new Volume
This wizard will help you to export the contents of a workbook to a new file system volume that can be distributed and loaded on other systems.
The currently selected workbook is displayed below. Please verify this is the workbook you would like to export.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Export Folder Items
Workbook to be exported:
Snapshots
Cancel
< Back
Next >
Export

3. Verify that the workbook name shown in this window is the name of the workbook you want to export.
4. Click **[Next]**.



5. Enter a destination path in the **Select a Destination Filepath** field or click the **[Browse]** button to select one using a navigation window.

   TrialDirector will create the specified folder if it does not already exist. The volume will be copied into this folder.

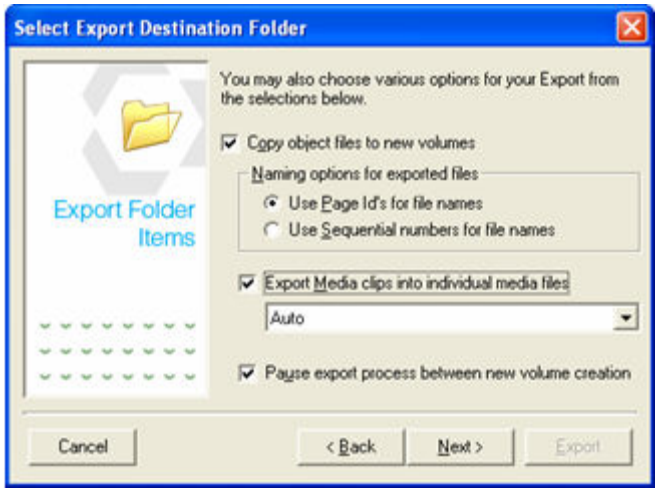
6. Select a volume size limit in the **Volume Size Limit** field to ensure that the volume will be able to fit on your chosen media (CD ROM, local drive, etc.).

   TrialDirector will create additional volumes if your data exceeds the volume size limit. If you plan to copy the volume to a disk or a CD-ROM after it has been exported, choose the appropriate volume size so that the exported volume will not exceed the limits of your media.

7. In the **Reference Files Over** field, enter the size limit (in MB) for files that will be copied into the exported volume folder.

   For item files that exceed this size, the load file will reference the original path to the file instead of copying the file to the volume. When the exported volume is loaded into a case, you can view a referenced file by mounting the volume where the file originally existed.

8. Click **[Next]**.
9. Select export options from the selections below.

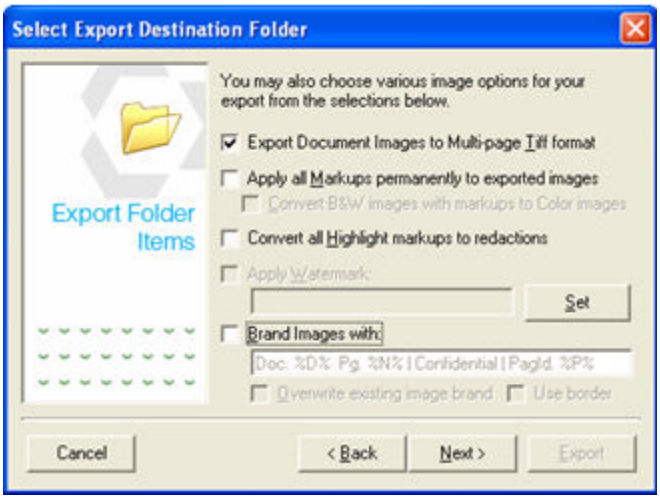

Select Export Destination Folder
You may also choose various options for your Export from the selections below.
Copy object files to new volumes
Naming options for exported files
Use Page Id's for file names
Use Sequential numbers for file names
Export Media clips into individual media files
Auto
Pause export process between new volume creation
Export Folder Items
Cancel
< Back
Next >
Export

Export Options:

Option	Description
Copy Object Files to New Volume	Allows you to copy the item files to the volume folder. If you do not select this option, the volume folder will only contain the load file, the database file and other related case files. There is no need to copy the files to the new volume if there are no changes to the actual image files and you only want to update the case database on another system to reflect new revisions and memos, etc.
Naming Options for Exported Files	Allows you to determine the naming convention for exported files. The naming options are only available if the **Copy object files to new volume** option is enabled. Select whether to use the Page ID or a series of sequential numbers for the exported file names. For example, if the Page ID option is used, an exported document item of EXH101001 will have a file name of EXH101001.TIF. If the sequential numbers option is used, each exported object file name will be assigned a new name using a 7-digit numbering scheme; beginning with 0000001. For example, the first document image within the exported folder will have a file name of 0000001.TIF.
Export Media Clips into Individual Media Files	This feature allows users to create individual Windows Media Video (*.wmv) files from Transcript Manager media clips. For example, a media clip is generated from specified in and out points of a parent video (i.e. *.mpeg) file. If the media clips are added to a

	workbook for export, this option is available. Check this option to export any media clips within the workbook to *.wmv files. The drop down list below is used to select the best encoding profile for the *.wmv file(s) to be created. The encoding profiles are listed by video resolution, video encoding bitrate and audio encoding bitrate. For example, the *TDS-352x288-768-64-S-1-1* profile will encode the target *.wmv file with a resolution of 352x288, a video bitrate of 768Kbps and an audio bitrate of 64Kbps. ***Note:*** *Use Transcript Manager to create individual media files (*.wmv*) from synchronized DVT Clips.*
Pause Export Process Between New Volume Creation	Allows you to permanently apply all markups to the exported image files. If you are providing the exported volume to opposing counsel, you may not want them to be able to remove the markups.

10. After the export options have been set, click **[Next]** to continue. The following dialog will appear:


Select Export Destination Folder
Export Folder Items
You may also choose various image options for your export from the selections below.
Export Document Images to Multi-page Tiff format
Apply all Markups permanently to exported images
Convert B&W images with markups to Color images
Convert all Highlight markups to redactions
Apply Watermark
Set
Brand Images with:
Doc: %D% Pg %N% | Confidential | PageId: %P%
Overwrite existing image brand
Use border
Cancel
< Back
Next >
Export

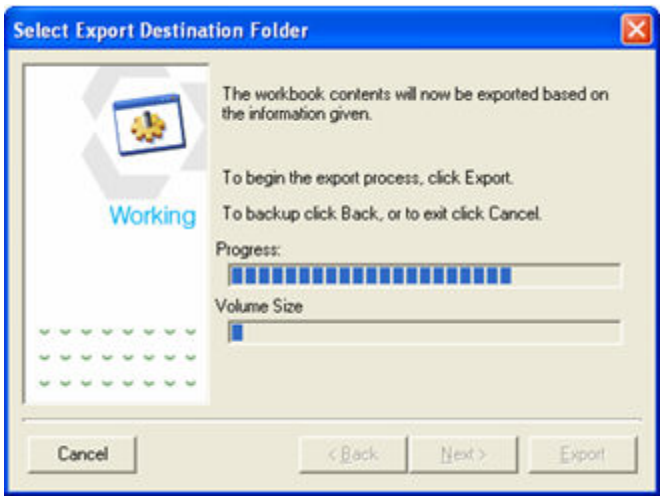
11. Set the export options as desired. Descriptions of the options are shown below:

Image Options:

Option	Description
Export to Multi-page Tiff Format	Allows you to convert all exported multi-page documents into multi-page TIFFs. If you do not select

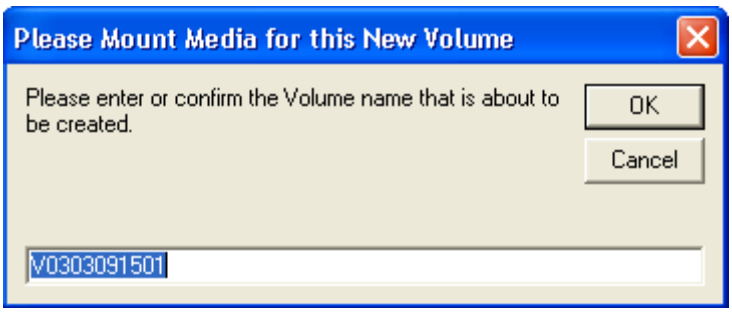
	this option, all multi-page documents will be split into single-page documents.
Apply All Markups Permanently to Exported Images	Allows you to permanently apply all markups to the exported image files. If you are providing the exported volume to opposing counsel, you may not want them to be able to remove the markups.
Convert B&W Images with Markups to Color Images	Select this option if you wish to maintain color markups on B&W images during export. This option is only available is the **Apply Markups Permanently to Exported Images** option is enabled. This option will create a 24-bit color TIFF image from B&W images that contain markups.
Convert All Highlight Markups to Redactions During Export	Allows you to convert all sections of the images that were highlighted with the Highlighter tool into permanent redactions on the exported images.
Apply Watermark	Allows you to permanently apply the currently selected global watermark to all exported images. The **[Pick]** button allows you to set the global watermark.
Brand Images With:	This allows you to apply footers to the bottom of all exported images. The default footer is the Document ID followed by the Page Number and then the Item ID. If you would like to customize the footer, you can add, remove, or rearrange the components of the footer in the Brand Images With field. %D% - Document ID %P% - Item ID %N% - Page Number %T% - Trial Exhibit Number %E% - Exhibit Number %DESC% - Description %RECNO% - Universal Record Number For example, if you wanted the Item ID and then the Page Number, you would enter %P% %N% in the field.

12. When you have finished setting the options, click **[Next]**.


Select Export Destination Folder
The workbook contents will now be exported based on the information given.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Volume Size
Cancel
< Back
Next >
Export

13. Click **[Export]** to begin exporting the volume.

TrialDirector will then prompt for the Volume Name for the export folder about to be created. This volume name is used for the export folder name, load file names and volume label references within some of the export load files. For example, the CT Summation *.dii load file within the export volume will reference a volume name of *V0303091501*, as shown in the figure below.


Please Mount Media for this New Volume
Please enter or confirm the Volume name that is about to be created.
OK
Cancel
V0303091501

Enter the desired volume name and click **[OK]** to continue. Clicking **[Cancel]** will cancel the export.

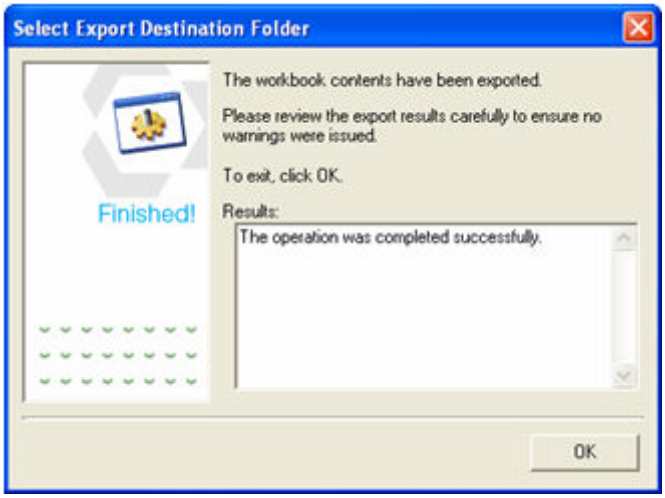
When the export begins, up to three status bars appear at the bottom of the Export window:

- The Export Process status bar shows you the progress of the entire export. When this bar reaches the end, the export is complete. This status bar is always displayed.

- The Volume Size status bar shows you the progress of the current volume. When this bar reaches the end, a new volume will be created, and the export will continue. This status bar is always displayed.
- The Creating Excerpt status bar shows the encoding progress of the current media clip excerpt. This status bar will refresh for each media clip excerpt, within the export folder, that is encoded. Depending on the length of the media clip, this process may take several minutes. This status bar is only displayed when the *Export Media Clips* option is enabled and valid media clips exist in the export folder.

Export Folder contents to new Volume [c:\export]
The Folder contents will now be exported based on the information given.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Volume Size
Creating Excerpt - VIDCLIP03-001
Cancel
< Back
Next >
Export

When the export is complete, the following window appears:


Select Export Destination Folder
The workbook contents have been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

14. Click **[OK]**.

In the Destination folder, there are separate folders for each volume. Each volume contains a load file (.oll) and a database file (.mdb). See Importing Items Using a Batch File for more information on importing the workbook contents into another TrialDirector case.

Apply Current Label to Workbook Items

This feature will automatically apply the current exhibit label to all images contained within a workbook. This feature is useful for applying exhibit labels to hundreds (even thousands) of images in a batch processing method. Once the labels are applied to the images, the workbook can be exported or printed. Selecting the **Apply all markups** option when exporting a workbook will "brand" the exhibit label to the exported images.

1. Select the current label style by clicking the Select Label option within the Label annotation tool drop down list. Also, the label numbering scheme and source field for the label can be set here. It is important to make sure the current label style is set to your specifications prior to applying labels to a workbook. If the label style needs to be changed, you may have to manually remove the label from each image prior to applying labels again.
2. To apply the current exhibit label to a workbook, right-click on the workbook and select **Apply Current Label to Workbook Items**. The following dialog will appear:

Apply Current Label to Workbook Items
This process will apply the currently selected label to workbook items using the label numbering method specified in the current label's design properties.
To apply the labels, click OK.
To exit without applying labels, click Cancel.
Apply Labels
Apply labels to:
Document Page 1 Only
All pages
Label Position
Bottom Left
Bottom Right
Trim leading zeros
OK
Cancel

3. A thumbnail image of the current label will appear in the upper right side of the dialog, as shown above. If this is not the label you wish to apply, click **[Cancel]** and select the correct label.
4. Select whether to apply the labels to all pages in the workbook or only page 1 of documents contained in the current workbook.
5. Select whether to position the label at the bottom left or bottom right side of the image. A thumbnail image of the label position appears to the right.
6. You can select whether to trim leading zeros that may occur in the label numbering scheme. For example, if you are using the Page ID as the source field for the label numbering and IDs such as EXH002051 exist, enabling this option will trim the 2 leading zeros to create exhibit labels with an ID of EXH2051.
7. Click **[OK]** to begin the labeling process. This process could take several minutes, depending on the number of images in the current workbook. Also, selecting the "All Pages" option can significantly increase processing time. During this process, TrialDirector will not be accessible.

Remove a Workbook

1. To remove a workbook, click on the desired workbook in the Workbooks Explorer.
2. Do one of the following:

    - Right-click on the workbook and select **Remove** from the shortcut menu.
    - Select **Remove** from the Workbooks menu.

    A message window will appear, asking if you want to remove the workbook.

    - Click **[Yes]** to remove the workbook and its contents. This will not remove the items that were in the workbook from the case.
    - Click **[No]** to cancel the removal.

More Information:

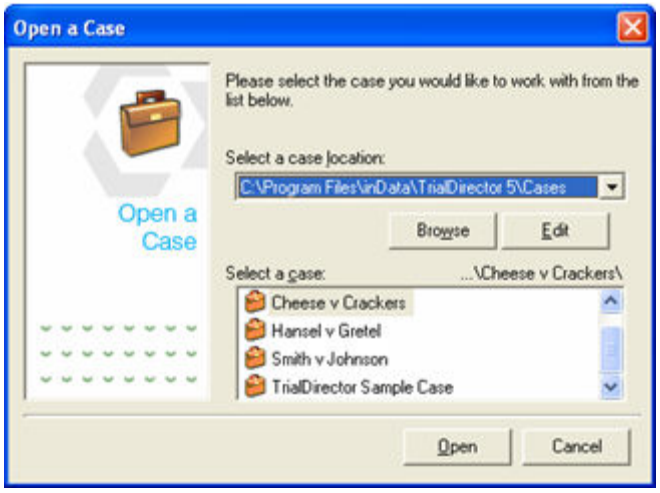
- Exhibit Management
- Exporting a Workbook to Adobe PDF
- Exporting Workbooks Containing Annotated PDFs

Cases

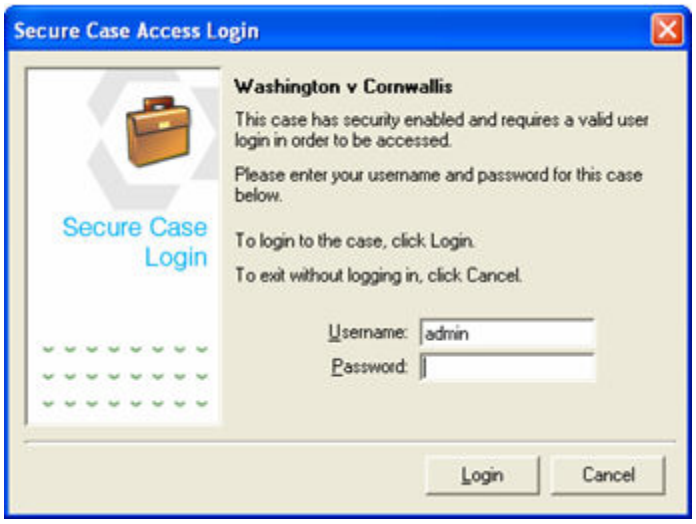
Open an Existing Case

To open a case:

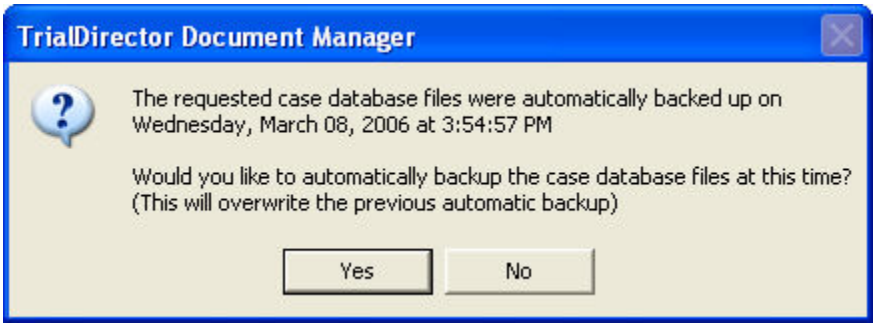
1. Select **Open Case** from the File menu or click the **[Open Case]** button on the Toolbar.



2. Use the drop-down list to select the desired case.
3. If you want to edit the case path, click **[Edit]** (see Manage Case Paths).
4. Click **[Open]**.
5. If you are opening a secure case, the Secure Case Login window will appear, as shown in the figure below.


Secure Case Access Login
Washington v Cornwallis
This case has security enabled and requires a valid user login in order to be accessed.
Please enter your username and password for this case below.
To login to the case, click Login.
To exit without logging in, click Cancel.
Secure Case Login
Username: admin
Password:
Login
Cancel

6. Enter your User ID and Password.
7. Click **[Login]** to open the case or click **[Cancel]**. Clicking Cancel will return you to the Open Case window, which will allow you to select a different case to open.
8. If you are an Administrator, you will be prompted to backup the case, shown below


TrialDirector Document Manager
The requested case database files were automatically backed up on Wednesday, March 08, 2006 at 3:54:57 PM
Would you like to automatically backup the case database files at this time? (This will overwrite the previous automatic backup)
Yes
No

9. When the case opens, the Case Explorer will display the case items and the Title Bar will display the case name and case path.

More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases

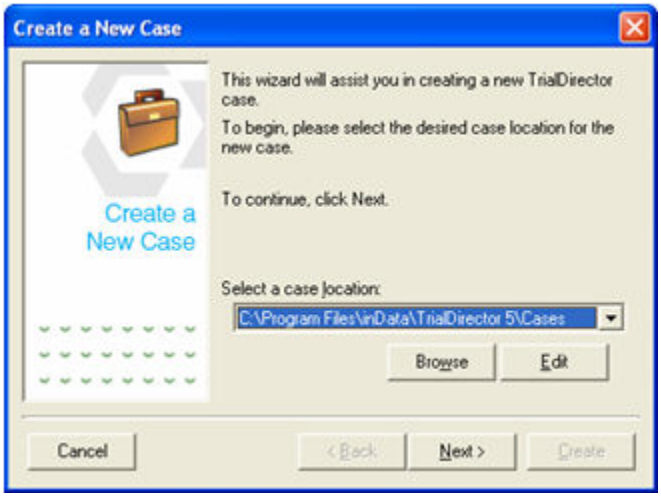
- Remove a Case

Create a New Case

In order to import items into TrialDirector, you must first create a 'case' to contain the items. You may create as many cases as you need.

To create a new case:

1. Select **Create a New Case** from the File menu or click the **[New Case]** button on the Toolbar.

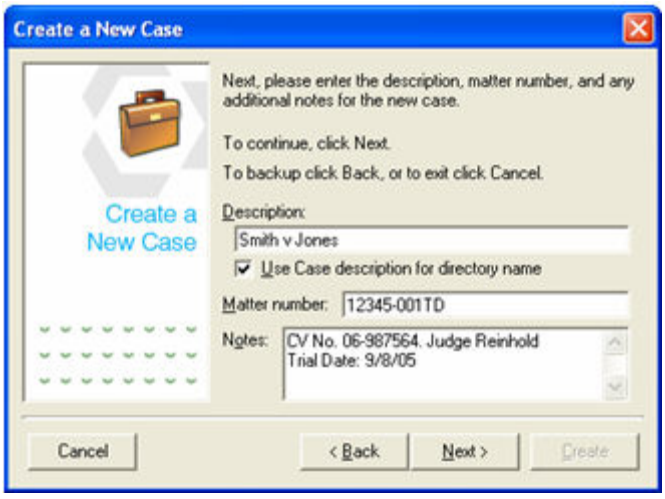

Create a New Case
This wizard will assist you in creating a new TrialDirector case.
To begin, please select the desired case location for the new case.
To continue, click Next.
Create a New Case
Select a case location:
C:\Program Files\inData\TrialDirector 5\Cases
Browse
Edit
Cancel
< Back
Next >
Create

The default case path is automatically selected as the destination location for the case files.

2. If you want to edit the case path, click **[Edit]**.

Note: *Long filename naming conventions are supported. You are not limited to eight character names.*

3. Click **[Next]**.


Create a New Case
Next, please enter the description, matter number, and any additional notes for the new case.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Create a New Case
Description:
Smith v Jones
Use Case description for directory name
Matter number:
12345-001TD
Notes:
CV No. 06-987564. Judge Reinhold
Trial Date: 9/8/05
Cancel
< Back
Next >
Create

4. Type the name of the new case in the Case Description field. You can also enter a Matter Number and Notes, if desired.
5. Select **Use Case description for directory** name if you want the directory name to be the same as the case Description.
6. Click **[Next]**.

Create a New Case
Finally, you can select to protect your valuable case data by enabling case access security.
To create the new case, click Create.
To backup click Back, or to exit click Cancel.
Create a New Case
Enable case access security
(case and feature access will depend on user login)
Administrator:
admin
Password:
Confirm password:
Enable case encryption
(case databases will be encrypted for extra security)
Cancel
< Back
Next >
Create

7. If you want to enable case security, select the **Enable Case Access Security** checkbox and enter an Administrator User ID and Password. To further secure case data, select the **Enable Case Encryption** checkbox (see Enable Case Security).
8. To create the new case, click **[Create]**

When the new case is created, the Case Explorer displays empty folders for Documents, Transcripts, and Multimedia items, and the Workbooks Explorer displays an empty workbook organizer. The Title Bar displays the name of the new case and the case number.

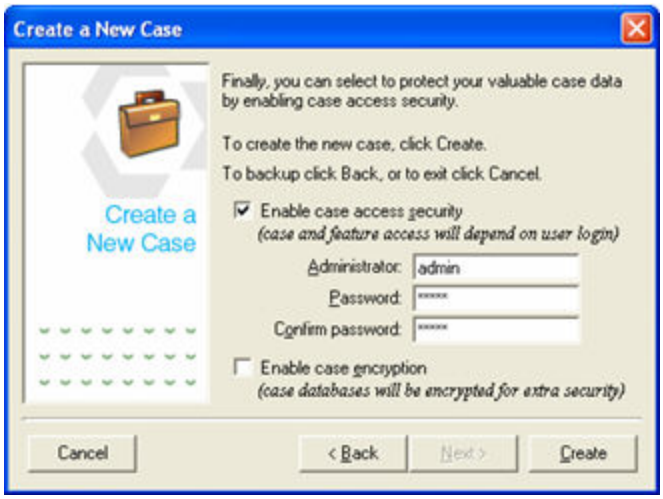
More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case

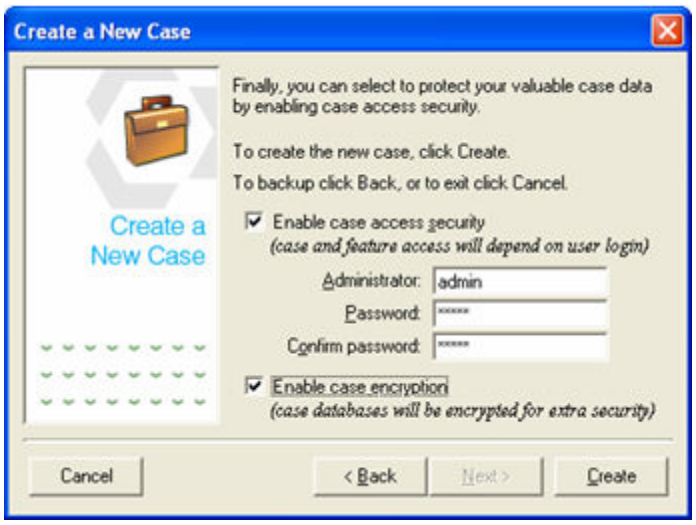
Enable Case Security

When you enable case security for a case, a user name and password will be required to access case data. You can also encrypt case data so that it cannot be opened and read by any other person or program. You can allow multiple users to have access to the case.

1. Select Create a **New Case** from the File menu.
2. Follow the instructions to Create a New Case to advance through the first two screens of the wizard.


Create a New Case
Finally, you can select to protect your valuable case data by enabling case access security.
To create the new case, click Create.
To backup click Back, or to exit click Cancel.
Create a New Case
Enable case access security
(case and feature access will depend on user login)
Administrator: admin
Password:
Confirm password:
Enable case encryption
(case databases will be encrypted for extra security)
Cancel
< Back
Next >
Create

3. To enable case security for the case you are creating, click the **Enable Case Access Security** checkbox.


Create a New Case
Finally, you can select to protect your valuable case data by enabling case access security.
To create the new case, click Create.
To backup click Back, or to exit click Cancel.
Create a New Case
Enable case access security
(case and feature access will depend on user login)
Administrator:
admin
Password:
Confirm password:
Enable case encryption
(case databases will be encrypted for extra security)
Cancel
< Back
Next >
Create

Note: *By default, you are the System Administrator when you create a new case and you must select an Administrator User ID and Password.*

4. Modify the Administrator User ID, if desired.
5. Enter an Administrator Password. The Administrators passwords are never displayed in plain text.
6. Enter the Password again to confirm it.

Note: *When you enable case access security, you can also enable case encryption, which provides additional security by scrambling your case data so that it cannot be opened and read by any other person or program. However, if you enable case encryption, you will experience a minor loss in performance.*

7. To enable case encryption, click the **Enable Case Encryption** checkbox.
8. Click **[Create]** to finish creating the case

More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case

Administer Case Users

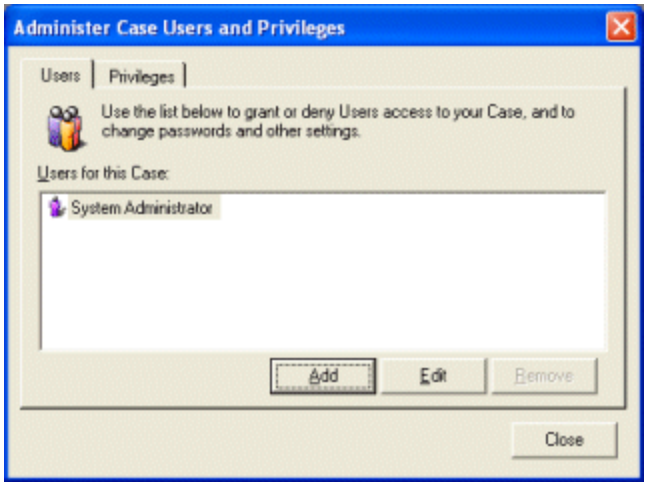
Topics:

- Add a User
- Edit a User Profile
- Remove a User
- Disable a User
- Log off a User

When case access security is enabled for a case, users with Case Management privileges (including the System Administrator) can add, edit, disable and remove users, as well as modify user privileges.

To change user settings,

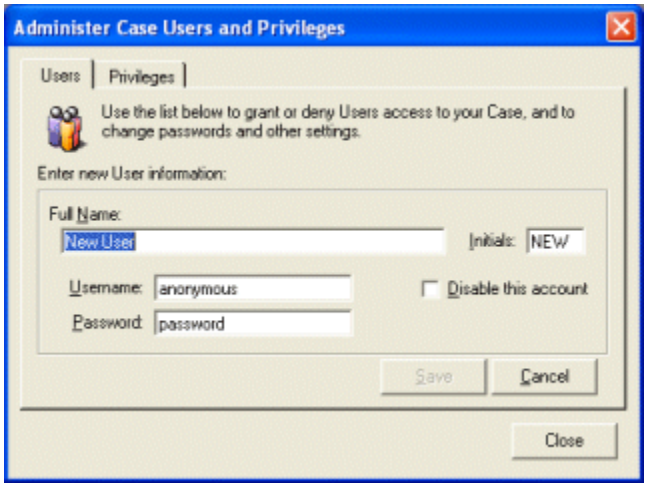
1. Select **Administer Case Users and Privileges** from the File menu.
2. The current case users are displayed in the window below. The System Administrator is designated by a purple icon, while all other users are designated by a red icon.



Add a User

To add a user to the case,

1. Click the **[Add]** button on the Administer Case Users and Privileges window.



2. Enter the user's full name and initials.
3. Enter a user name and password for the user.
4. Click **[Save]**.

The user will now be able to log into the case. By default, the user will have limited case privileges. Click the Privileges tab to modify the user's privileges.

Edit User Information

To edit user information,

1. Click the **[Edit]** button on the Administer Case Users and Privileges window.
2. Make the desired changes to the user information.
3. Click **[Save].**

Remove a User

To remove a user,

1. Select the user you want to remove in the Administer Case Users and Privileges window.
2. Click **[Remove].**

The user will no longer be able to log into the case

Disable a User

To disable a user,

1. Select the user you would like to disable in the Administer Case Users and Privileges window.
2. Click **[Edit].**
3. Select the **Disable This Account** check box.

4. Click **[Save].**

The user will not be able to log into the case until you enable the user again.

Log Off a User

To log off a user,

1. Select **Log Off User: (*Name*)** from the File menu.
2. The user will be logged off, and the Secure Case Access Login screen will appear, allowing you to log in as a different user.

More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Manage Case Databases
- Remove a Case
- Change Case Properties

Manage TrialDirector Cases

TrialDirector uses 'cases' to collect and organize all exhibits associated with a specific matter. The first step in using TrialDirector is to create a case. The links below lead to descriptions of common tasks used for case management.

Topics:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case
- Change Case Properties

Moving and Copying Files

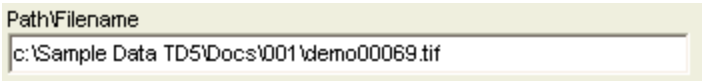
When working in TrialDirector, you may need to move or copy entire cases or files linked in to cases. The Common Tasks table below lists examples and the recommended method for completing each task. Before you use any of these methods, ensure you are familiar with File Management in TrialDirector.

Keep the following in mind:

- The exhibit files in your case, such as the image files and video depositions, are not part of the TrialDirector case file. They exist as separate files on your computer or network, but are used by and displayed by TrialDirector.
- TrialDirector divides exhibit files into two broad categories: *Digital Video Transcripts (DVTs)* and *Documents*. "DVT's" include a specific type of video file and an associated digital transcript; "Documents" include almost everything else, such as image files, photos, native files (Word, PowerPoint, and so on), and many multimedia file types.
- If you're going to be moving and sharing files across multiple computers, we recommend that you establish naming conventions for your file system. This will simplify or even eliminate some file movement concerns. For a very simple example, if your computers all have a CD drive identified as D:\, and your image files are always stored in D:\CaseData\Images, you could move any case to an alternate computer and it would always find its files (if the correct CD was in drive D:\).

TrialDirector Terminology

Term	Definition
Case File	A TrialDirector Case file contains the organization and annotation instructions that you have applied to the case exhibits. This includes all of the databases, workbooks, issue coding, annotations, notes, security options, scripts, and so on related to the case. Your selections within TrialDirector are applied to exhibit files, which can be thought of as existing separately. ***Note:*** *The exhibit files in your case, such as the image files and video depositions, are not part of the case file. When TrialDirector case files and their associated document files are moved to a different computer, the document files must be reconnected to the case files unless the file and path names are exactly identical in the new location.*
Exhibit File	Exhibit files are the documents, photos, multimedia files, and so on that comprise trial evidence. These items are maintained separately from TrialDirector case files; TrialDirector makes use of them, but does not alter them. (For example, annotations or redactions appear as a separate layer or layers above the original document.)
Load File (or Batch File)	A load file is the easiest way to add a large number of documents to TrialDirector. For example, if a vendor has prepared a large number of scanned & OCR'd image documents related to a case, you will usually be provided with a load file for the documents. When you import the documents using the load file, the documents are added to your case, and all the database records to identify

	them are created automatically. You can use TrialDirector to either import or export (create) a load file.
Volume	A volume is the storage location for exhibit files used by TrialDirector. A volume can be on your computer's hard drive, a hard drive on your company's network, or a removable storage device, such as a CD or DVD ROM, a ZIP disk, or a flash drive. Note that a volume does not have to be the entire storage media. A volume can be a folder on a hard drive, for example, or it might be a CD ROM.
Path	The path is the "address" of a file or it's folder on a volume. Here's an example of a path from an Item Properties screen:  When exhibit files are moved, it is necessary to change the path so that TrialDirector can locate them. This can be done for individual files, or for an entire set of files using the Global Path Editor command.

Common Tasks

If you want to:	Do this:
Try something out on a copy of your case (i.e. you think a document could be corrupt and want to try adding it to a "dummy" case before adding it to your master case)	Use Copy a Case The Copy a Case feature copies the database and all files within the main case folder and subfolders. (It does not copy files linked in to your case that are stored in other locations, such as your My Documents folder or exhibits stored in folders on your network.)
Enable someone else in your office to import your case information	Make Case Load Files Case load files also enable you to import case information into other programs.
Tell TrialDirector to look in one or more new locations for all of the files (or a batch of files) linked in to your case (i.e. the exhibits are in a network folder now instead of on your hard drive)	Use Global Path Editor
Move a few documents (not DVTs)	Move the files as you would any files on your computer (such as by dragging and dropping between folders). Then, in TrialDirector, right-click on each filename and change the **Properties** to the new **Path\Filename**.

Move Digital Video Transcripts (DVTs)	Follow the instructions in Modify Multimedia Source Paths

For information on database management tasks (such as backing up a case database, repairing a case, restoring a case database, etc.), see Managing Case Databases.

More Information:

- Manage Cases
- Manage Case Paths

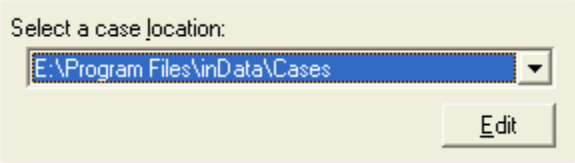
Manage Case Paths

The locations used to store cases on your computer or network are recorded by TrialDirector so that you can easily find and share cases. When you create, open, or remove a case, you have the option to chose a different case location than the one presented. You can select an alternate path from a list of previous case locations, add a new case location, or remove case locations from the list.

Note: If your case exhibits have moved to a new location, use the Global Path Editor to update the path(s).

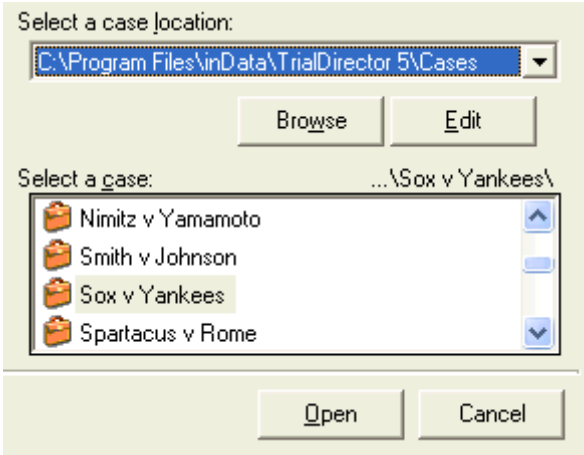
To select a case path:

1. Select **Create a New Case, Open a Case or Remove Case(s)** from the File menu. Each of the three dialogs displays the current case path, as shown below.



Note: *TrialDirector case locations can be on local hard disks, shared network drives or even UNC paths.*

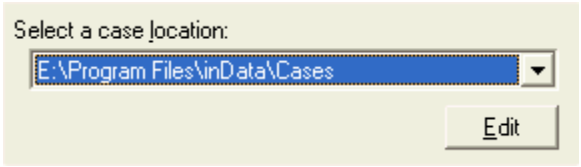
2. The paths that have already been added on your system are listed in a drop-down list. To change the current path, click the drop-down arrow and select an alternate path from the list.
3. After you've identified the case location, you can select the desired case from the list of all cases in the location. Click **Open** to open the desired case.



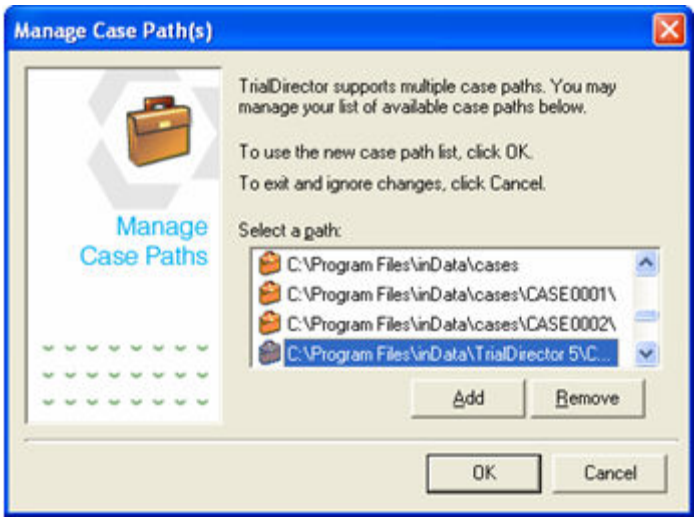
Add or Remove a Case Path

You may occasionally need to add or remove a case path. For example, you may need to access a case on a network computer, or you may wish to simplify your path lists by removing old cases.

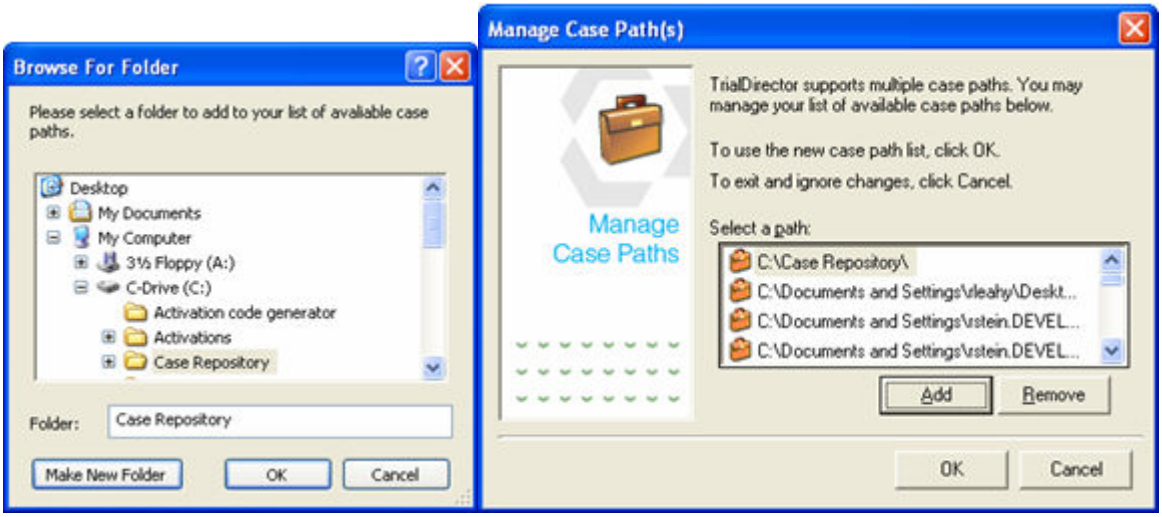
1. To change the list of available paths, click **Edit**.



2. The **Manage Case Path(s)** dialog opens.



3. To add a new path, click **Add**. In the resulting selection window, browse to the new path and click **OK** to return to the Manage Case Paths window. The new path will be listed in the window.



4. To remove a case path, select the path you want to remove and click **Remove.**
5. A warning message will appear. Click **OK** to remove the path or **Cancel** to return to the Manage Case Paths window without removing the path.

Note: *This operation will only remove the selected path from the list of case paths and will not delete any files or directories from the selected path.*

More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case

Managing Case Databases

TrialDirector includes several features you can use as needed to maintain your case database.

If you want to:	Use this:
Back up your case database (i.e. all notes, markups, annotations, and coding information)	The Backup a Case feature Back up your case every few days and especially before processing large load files or importing information from an external application.
Try something out on a copy of your case (i.e. you think a document could be corrupt and want to try adding it to a "dummy" case before adding it to your master case)	The Copy a Case feature The Copy a Case feature copies the database and all files within the main case folder and subfolders. (It does not copy files linked in to your case that are stored in other locations, such as your My Documents folder or exhibits stored in folders on your network.)
Improve performance for a large case (particularly if the case has had a large number of deletions)	The Pack a Case feature Packing a case is similar to defragmenting your hard drive. It is a cleaning process that removes blank space, which may improve case response time in TrialDirector.
Fix a case that is displaying strange information (i.e. erratic database behavior, fields not properly refreshed, etc.)	The Repair a Case feature
Restore a case database that will not open, continues to display erratic	The Restore a Database procedure

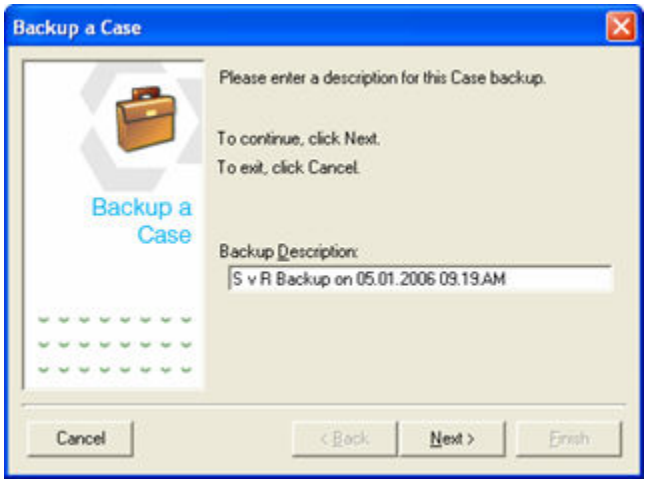
database behavior after repair, or must be reverted back to an earlier state.	

Backup a Case

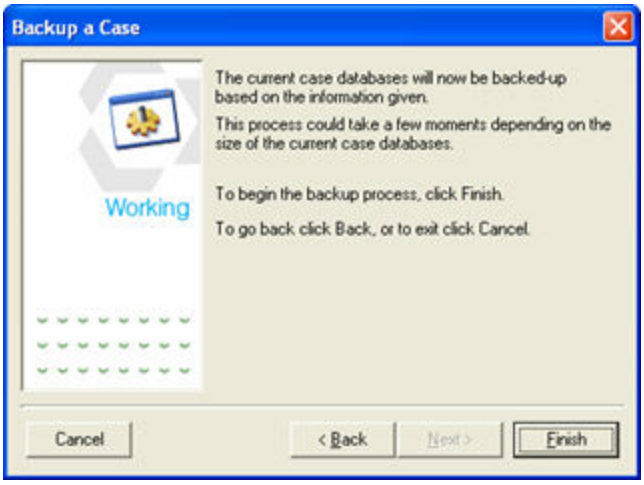
A case backup does not back up all files in a case, rather, it creates a backup copy of the databases associated with the case, which preserves all notes, markups, annotations, and coding information that has been created to support the case documents. (Backup of documents and exhibit files such as transcripts and video are typically handled by separate utilities provided your system administrator.)

inData recommends running the case backup process before processing large load files or importing information from an external application. This provides a fall-back position in the (unlikely) event that a problem occurs during an import.

1. From the **File** menu, select **Case Databases**, then **Backup...**
   The **Backup a Case** dialog opens. Specify a description for the backup, then click **Next**.



2. A second screen appears. Click **Finish** to process the backup or **Cancel** to exit.


Backup a Case
The current case databases will now be backed-up based on the information given.
This process could take a few moments depending on the size of the current case databases.
Working
To begin the backup process, click Finish.
To go back click Back, or to exit click Cancel.
Cancel
< Back
Next >
Finish

Note: *The time required to backup is dependent of the amount of information in the databases. For example, the databases associated with the TrialDirector sample cases will back up in one or two seconds.*

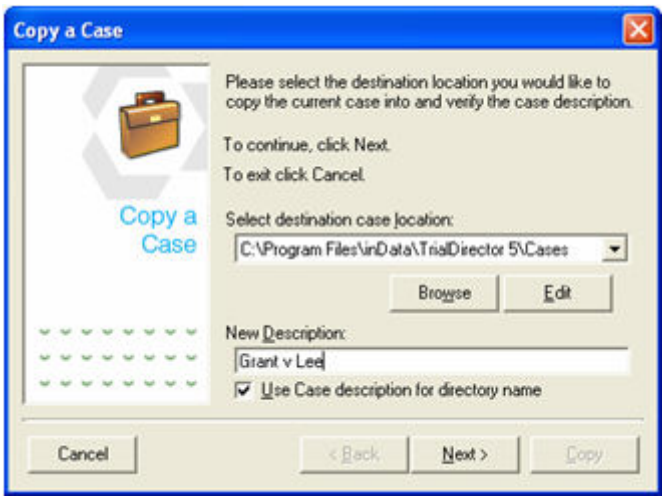
Copy a Case

TrialDirector allows you to create an identical copy of an existing case. Using this method, you can copy a case that exists on your local drive to a network drive where it can be retrieved by other computers. This process will copy the entire contents of the current case directory. All sub-directories, including screen grabs and OCR full text are copied. Secure cases will still retain all user names and associated privileges.

Note: *When you create a copy of a case, any changes that you make to either case will not be reflected in the other case. This is because the cases do not share case data.*

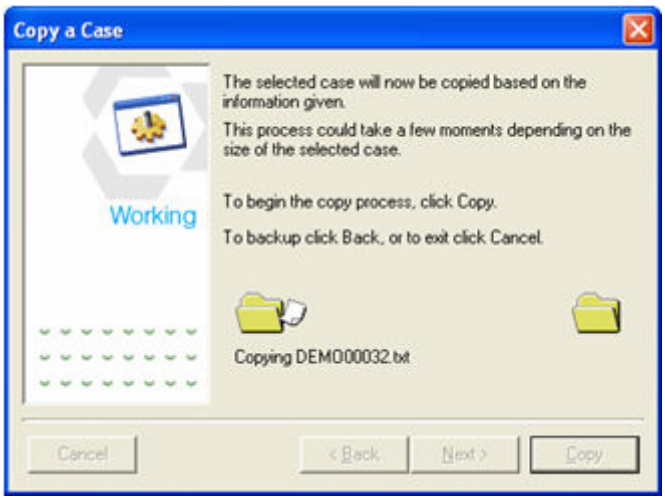
To create a copy of a case,

1. Open the case you would like to copy
2. Select **Case Databases | Copy** from the File menu.

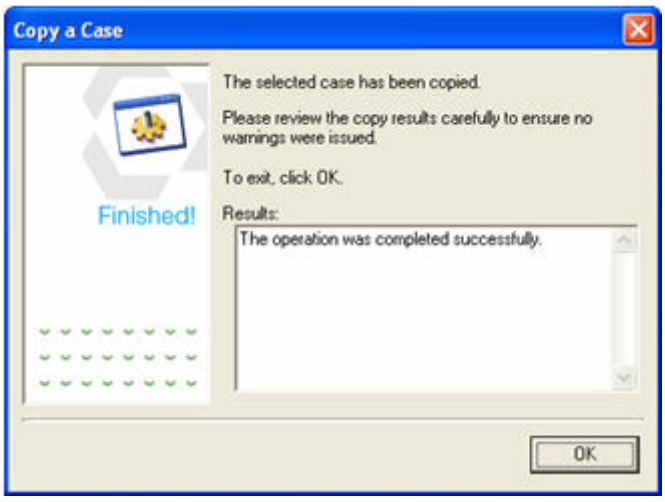


Note: *The destination case location can be a shared network drive or a removable disk, such as a Zip™ disk. This provides an effective way to backup case data. Also, the destination case location can be a shared directory on another PC. This is a great way to transfer case data to a trial PC.*

3. The default case path is automatically selected as the destination location for the case files.
4. If you want to edit the case path, click **[Edit]** (see Manage Case Paths). You can also rename the case if desired, using the New Description field.
5. Click **[Next]**.


Copy a Case
The selected case will now be copied based on the information given.
This process could take a few moments depending on the size of the selected case.
Working
To begin the copy process, click Copy.
To backup click Back, or to exit click Cancel.
Copying DEMO00032.txt
Cancel
< Back
Next >
Copy

6. Click **[Copy]**. The duration of the copy process depends on the number of items to be copied.


Copy a Case
The selected case has been copied.
Please review the copy results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

7. When the process is complete, the copied case will display in the destination location selected in the first step. Click **[OK]**.

Note: *The Case Explorer will display the copied case items and the Title Bar will display the new case name and case path.*

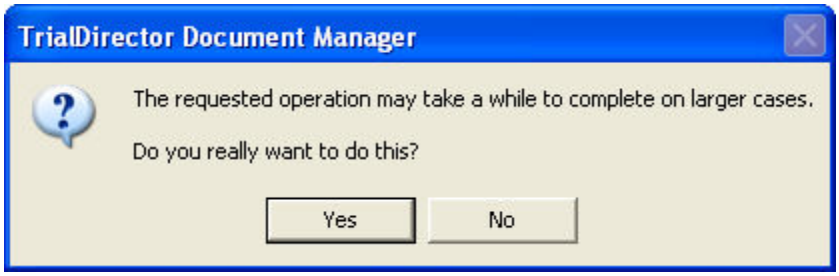
Pack a Case

'Packing' a database is a housecleaning process that removes blank space left by file deletions. This can improve response time, especially in very large case files, or in cases that have had a large number of deletions. This will not affect the current information in the database.

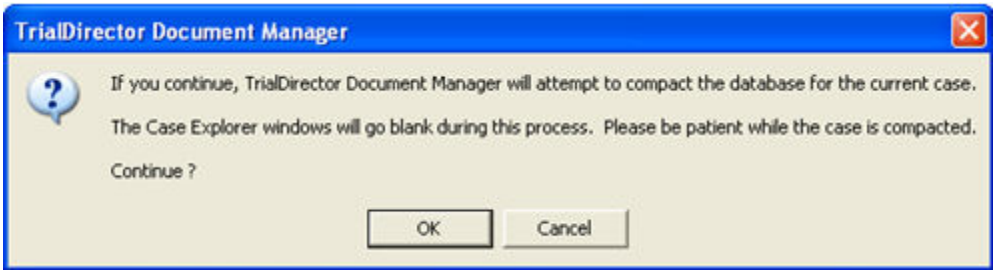
To compact the current database:

1. Select **Case Databases | Pack** from the File menu. If you access the File menu from the Case Library or Document Manager tabs, only the document database will be 'packed'. If accessed from the Transcript Manager, the transcript database will be packed. If accessed from the Coding tab, the coding database will be packed.

Note: *If you are working in a network environment, ensure that the case is not open by another user in order to avoid an error message.*


TrialDirector Document Manager
The requested operation may take a while to complete on larger cases.
Do you really want to do this?
Yes
No

2. Click **[Yes]** to continue or **[No]** to cancel the process
3. When the process is complete, a message window will appear. Click **[OK]** to return to the application window.


TrialDirector Document Manager
If you continue, TrialDirector Document Manager will attempt to compact the database for the current case.
The Case Explorer windows will go blank during this process. Please be patient while the case is compacted.
Continue ?
OK
Cancel

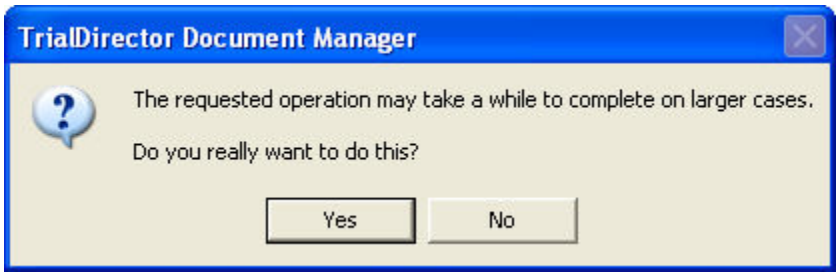
Note: *Attempting to pack larger cases may take longer. TrialDirector cases over 100,000 records may take a few minutes to pack.*

Repair a Case

A case database should be repaired if the database behavior seems erratic or if the database fields are not properly refreshed. This will not affect the current information in the database.

To repair the current database:

1. Select **Repair Case Database** from the File menu. (Only visible from the Case Library, Document Manager, or Coding tabs.)


TrialDirector Document Manager
The requested operation may take a while to complete on larger cases.
Do you really want to do this?
Yes
No

2. Click **[Yes]** to continue or **[No]** to cancel the database repair.

Note: *If you are working in a network environment, ensure that the case is not open by another user in order to avoid an error message.*

3. When the database repair is complete, a message window will appear, informing you that the process is complete. Click **[OK]** to return to the application window.

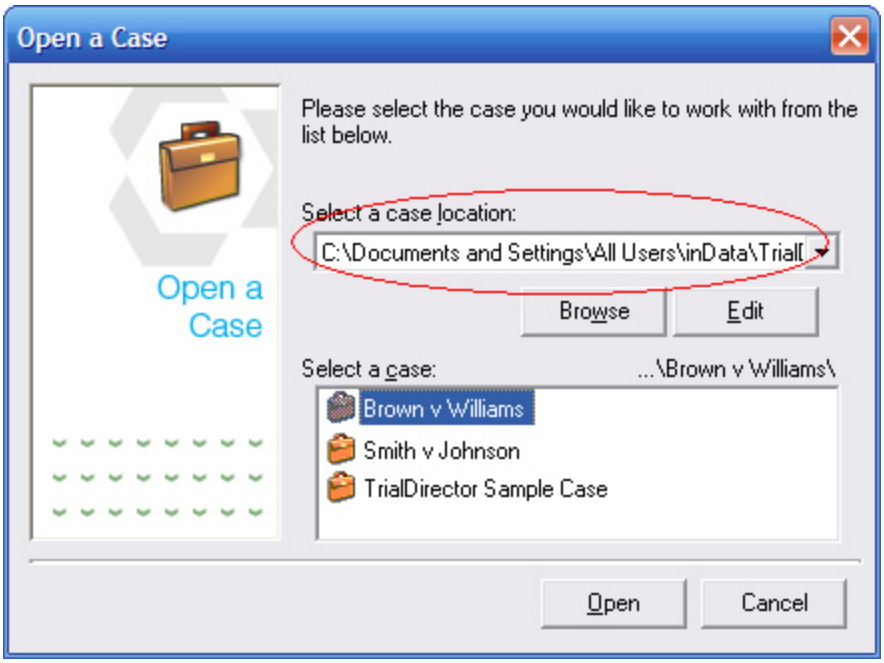
Restore a Database

Restore a case database from a backup if one of the following occurs:

- The case will no longer open in TrialDirector
- Erratic results continue after you have used the Repair Case Database utility
- It's necessary to return to a previous database state (for example, if incorrect changes were made to the case that are not easily reversed, you can restore the case database using the previous day's backup)

To restore a case database:

1. To determine where the case database files are located, on the **File** menu in TrialDirector, click **Open a Case**. Select the case name to display the case location.



2. Navigate to this location in Windows.
3. Ensure the case is not open in TrialDirector. Then, copy all files in the case folder to a new, temporary folder (for example, "Smith Case OLD").
4. Navigate to the location where case backups are stored and locate the most recent backup of the case.
5. Copy all files from the backup case folder to the active case folder you located in Step 2. When the prompt appears, click **Yes** to confirm you want to replace existing files.
6. Open the case in TrialDirector. Once you've determined the case is working correctly and contains the expected data, delete the temporary folder you created in Step 3.

More Information:

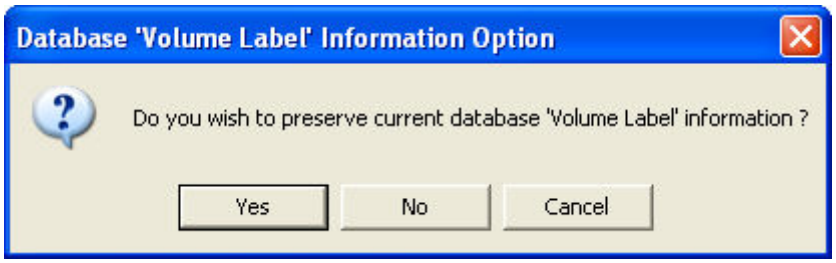
- Create a New Case
- Open a Case
- Enable Case Security

- Remove a Case
- Change Case Properties
- Moving and Copying Files

Make Case Load Files

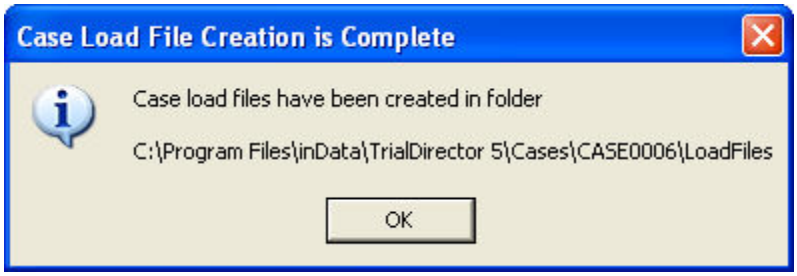
TrialDirector can be used to make load files for sharing exhibit files with other users, moving the case to a different computer, or for use by an alternate program. Before you make case load files, review Moving and Copying Files to ensure this is the best method for what you want to do.

1. To make load files from a case, select the **Make Case Load Files** command from the **Tools** menu. A dialog box will open asking if you want to use the same Volume Label information. If the load file will be used on the same computer or a computer using the same volume naming conventions, click **Yes**. Otherwise, click **No**.



2. If you selected **No**, the dialogue below will open. Specify the desired Volume Label in the field provided, then click **OK**.

3. After you clicked **Yes** in step 1 or **OK** in Step 2, the following screen will appear, giving the location of the load file(s).


Case Load File Creation is Complete
Case load files have been created in folder
C:\Program Files\inData\TrialDirector 5\Cases\CASE0006\LoadFiles
OK

Note: *Case load files are automatically created in formats required by several different applications. The file with the .oll extension is the TrialDirector format, the .dii file is the one required for CT Summation products.*

More Information:

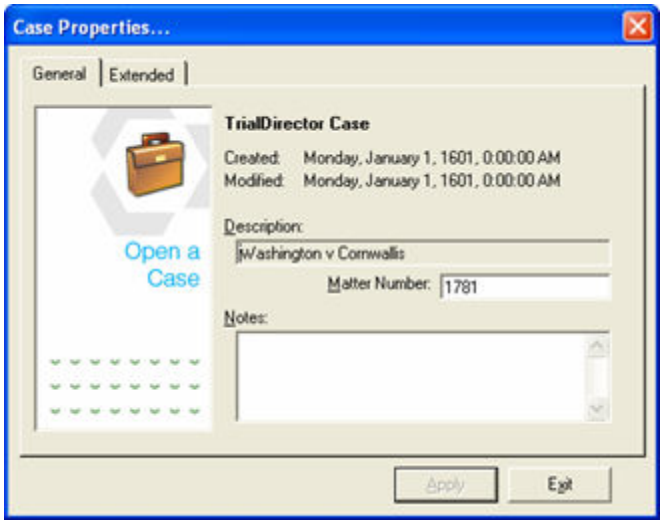
- Import Items Using a Batch (Load) File
- Digital Video Transcript
- Clips

Change Case Properties

Case properties can be changed from the Case Library, Document Manager, or Coding modules.

To change the case properties

1. Select the case in the Case Explorer, then select **Item Properties** from the **View** menu.



2. Check the *Created* and *Modified* dates to determine if the case properties have been changed since the initial creation date.
3. You can modify the fields Matter Number and Notes fields on the General tab, and verify information on the Extended tab. Click **[Apply]** to save changes or **[Exit]** to abandon the changes.

Note: *The Extended tab is an easy way to determine the actual path of the current case.*

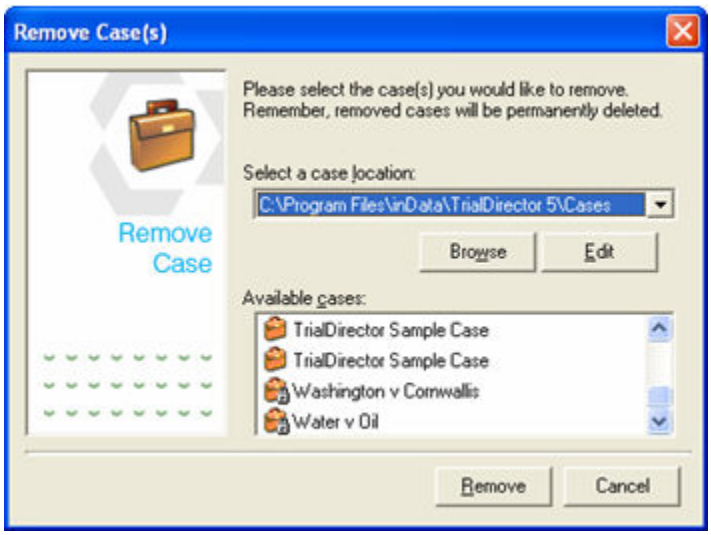
More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case

Remove a Case

To remove a case:

1. Select **Remove Case(s)** from the **File** menu.



Note: *When attempting to remove a secure case, the user is prompted to login with a valid username/password prior to removal. Only those users with valid privileges are allowed to remove cases. Secure cases are indicated with a padlock icon, as shown in the image above.*

2. To edit the case path, click **[Edit]** (see Manage Case Paths).
3. Select the case or cases you would like to remove. A special icon indicates that a case cannot be removed because it is currently open. If you want to remove the case that is currently open, you must open a different case before attempting removal.
4. After you have selected the case(s) you want to remove, click **[Remove]**. A warning message will appear, allowing you to confirm the removal.
5. Click **[Yes]** to remove the case(s) or **[No]** to cancel the removal.

Note: *If you are working in a network environment and another user has a case open, you will not be able to remove that case.*

More Information:

- Create a New Case
- Open a Case
- Enable Case Security
- Administer Case Users
- Manage Case Databases
- Remove a Case

Document Manager

Document Manager

Document and Exhibit Management Made Simple

The Document Manager effectively organizes all kinds of electronic case exhibits from scanned images to deposition testimony clips to presentations created in Adobe Acrobat or Microsoft PowerPoint. By handling the universe of exhibits in one TrialDirector tab, Document Manager eliminates the paper hassle and audiovisual equipment demands of traditional exhibit management.

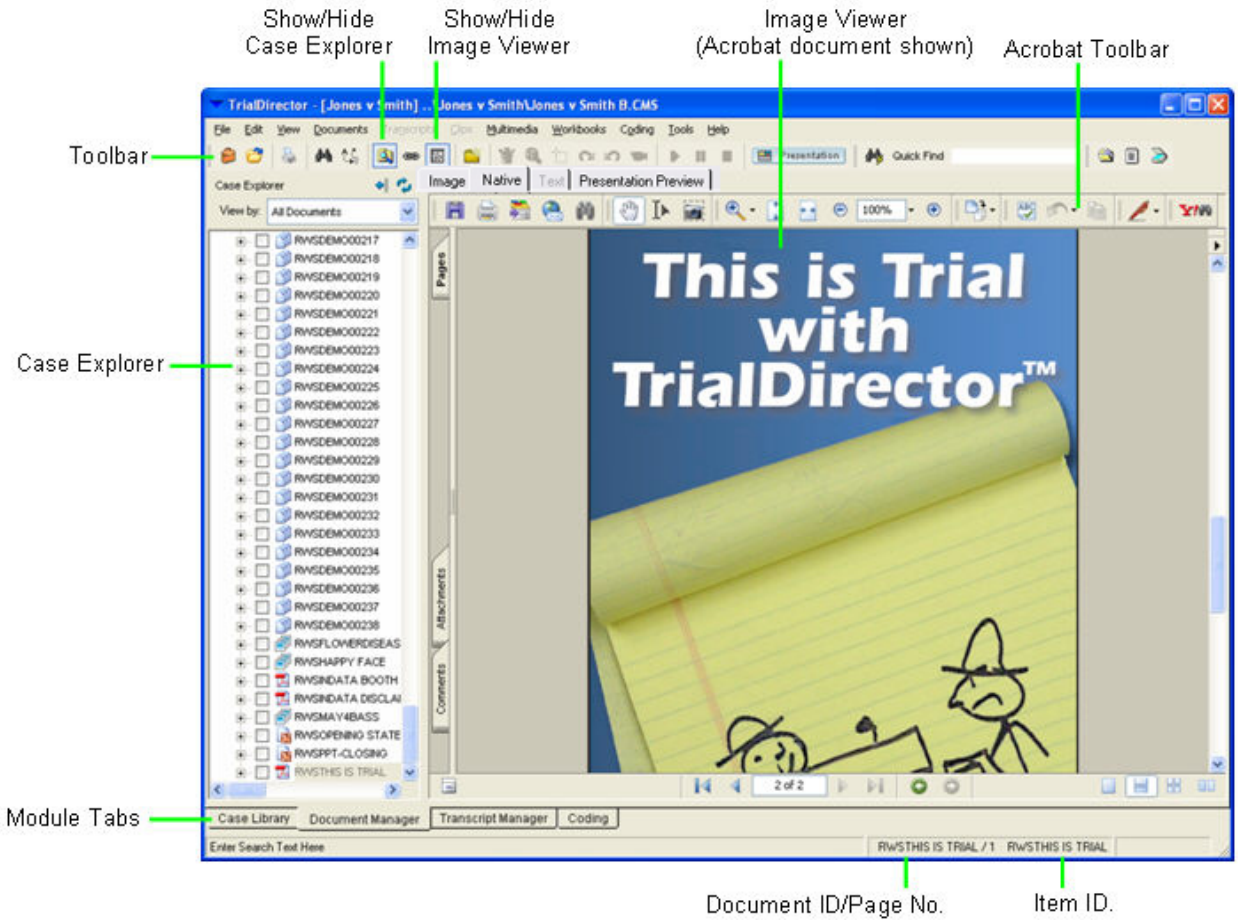
Documents can be prepared for trial using an extensive set of annotation tools including the highlighter, arrow, note and stamp tools. Clips can be created from multimedia streams, allowing key portions to be captured for trial presentation. Case items can be dragged and dropped into various workbooks for a higher level of organization and workbook items can then be exported into a separate volume or an exhibit outline for use as a trial notebook.

More Information:

- The Document Manager Tab
- Coding Database
- Exhibit Management
- View Case Items
- Exhibit Outlines
- OCR full Text
- Options

The Document Manager Tab

The Document Manager window is used to manage trial documents. The list of documents is displayed in the Case Explorer, and individual items or pages are shown on the right side of the window. The toolbar contains the icons available in the Document Manager, and the Module tabs are shown below the Case Explorer.



Component	Description
Toolbar	The Toolbar provides you with shortcuts to perform menu commands.
Case Explorer	The Case Explorer contains the universe of case items including documents, charts, photos, animations, DVT clips, OLE objects, and coded data.
Item Viewer	The Item Viewer displays any case item selected in the Case Explorer. Images, videos and OLE (native format) files can all be viewed in the Item Viewer.
Module Tabs	The Module Tabs allow you to switch modules in TrialDirector. Just click on the desired tab to make it active. (Menus will change as you change tabs.)

Change the Window Split

To change the way Document Manager splits the display between the Case Explorer and the Item Viewer, move the cursor slowly between the two windows until it changes into a double-sided arrow at the point of split. Click and drag the cursor to the left or right to resize the Case Explorer and Item Viewer windows.

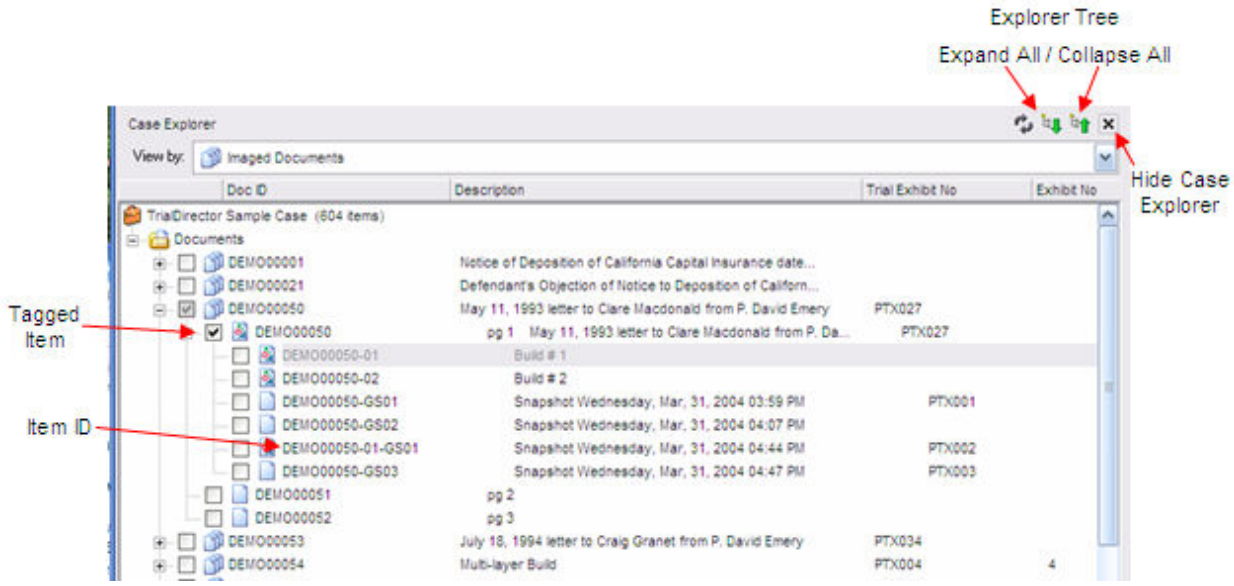
More Information:

- View Case Items
- Native Files

Case Explorer

Case Explorer represents the database that is used to organize all document exhibits associated with a case. To expand Case Explorer to use the full window, click the **Show/Hide Item Viewer** button:

The following diagram shows some of the features in Case Explorer:



Editing the Document Description (Properties)

If needed, you can add or modify the description displayed in the Case Explorer using either of the following methods:

- Open the pop-up column editor
- Open the Item Properties dialog box

To open the pop-up editor:

1. Click to select the desired document, then right-click and select **Edit**. (You can also select the desired item and click the F2 key.)
   The pop-up editor appears.

2. Select the information in any column and edit it. Changes are saved automatically. Use the mouse or tab key to move between columns.

   Note: If you edit the Description or the Trial Exhibit No. here, TrialDirector will update this information in the Coding database also.
3. To edit the information for another document, use the up and down arrow keys to move between documents.

   Note: The arrow keys move through the explorer grid based on the way that you are viewing. For example, if you have a document expanded to display the individual pages, the pop-up editor will move from page to page. If a document is not expanded, the pop-up editor will jump to the next document.

To edit from the Item Properties window:

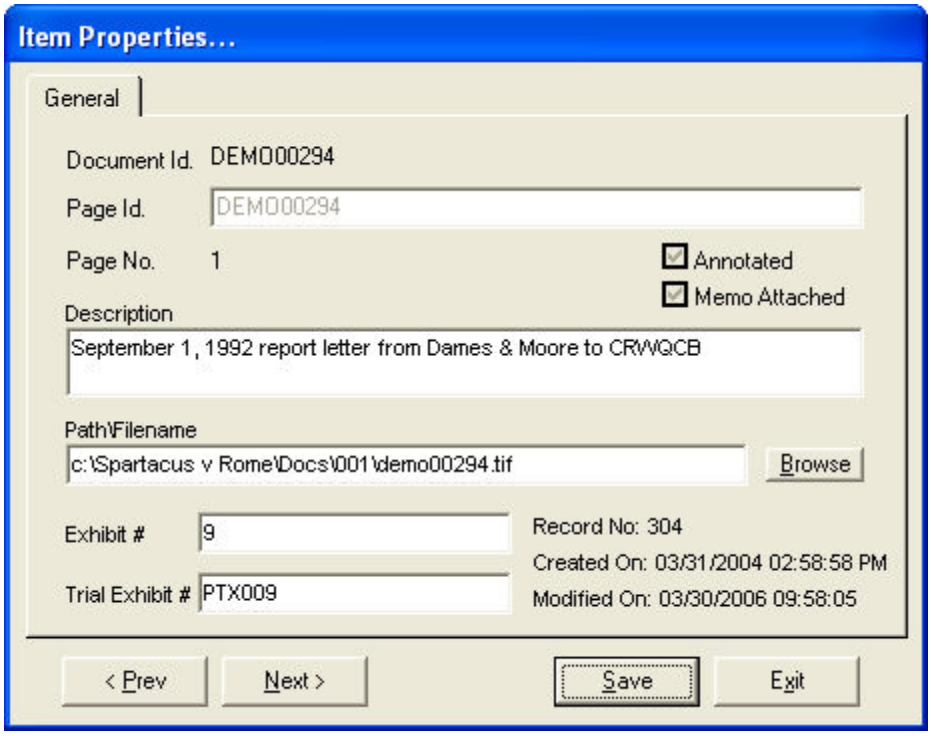
1. Click to select the desired document, then right-click and select **Item Properties**.
2. The Description, Path\Filename, Exhibit #, and Trial Exhibit # boxes are all editable.

   Note: *If* you edit the Description or the Trial Exhibit # here, TrialDirector will update this information in the Coding database also.
3. You can move to the previous or next documents in the Case Explorer by clicking **Prev** or **Next**. (Edits are automatically saved as you click **Prev** or **Next**.)

   Note: The **Prev** or **Next** buttons move through the explorer grid based on the way that you are viewing. For example, if you have a document expanded to display the individual pages, the Item Properties will move from page to page within the document. If a document is not expanded, the Item Properties will jump to the next document.

4. When you're finished, click **Save** to save your changes and close the window, or **Exit** to close the window without saving.

   Note: Since changes are automatically saved as you click **Prev** or **Next**, the **Save** and **Exit** options only apply to the last Item Properties dialog box.



More Information:

- Filter Case Explorer by File Type
- View Case Items

Document Manager Options

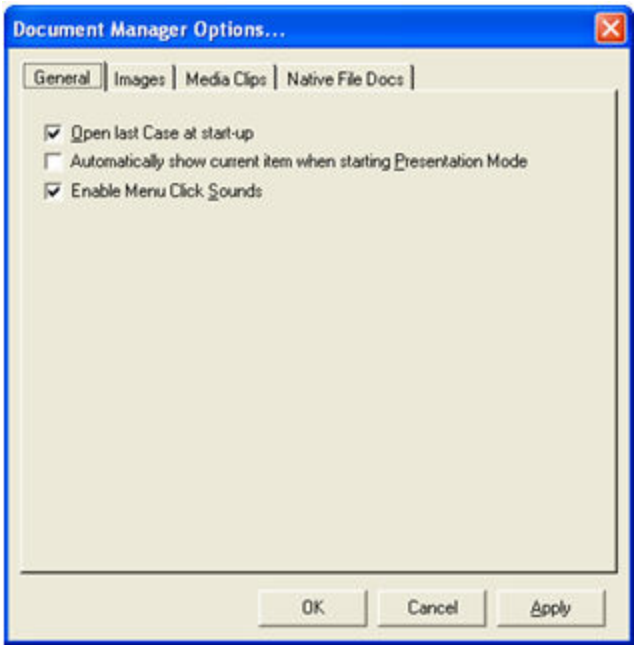
Topics:

- General Settings
- Images Settings
- Media Clips
- Native File Docs

To open the Options window, select **Options** from the View menu.

General Settings

The General tab within the Document Manager Options window allows you to set the general options for Document Manager.



- Allows Open last Case at Start-up to be set.
- Allows you to automatically show current item when starting Presentation mode. When this option is selected, the current item is automatically displayed when you launch the Presentation mode.
- Allows Enable Menu Click Sounds to be set.

Images Settings

The Images tab of the Document Manager Options window allows you to set the image viewing options.

- Allows the Auto Color Palette Mode to be set
- Allows the Anti-Alias Black and White Images to be set
- Allows the Zoom setting to stay the same when switching images
- Allows the setting of the Redaction properties

Media Clips

The Media Clips tab allows you to set the Media Clips options.

- Allows you to automatically Display a New Segment after Creation

Native File Docs

The Native File Docs tab allows you to set the auto save option for Microsoft Word.

- Allows the Auto Save of Microsoft documents to be set

More Information:

- Document Manager

View Case Items

When you are working in the Case Library or Document Manager and select an item in the Case Explorer, the Item Viewer displays it on the right side of the screen. You can also view items when you work in the Coding module.

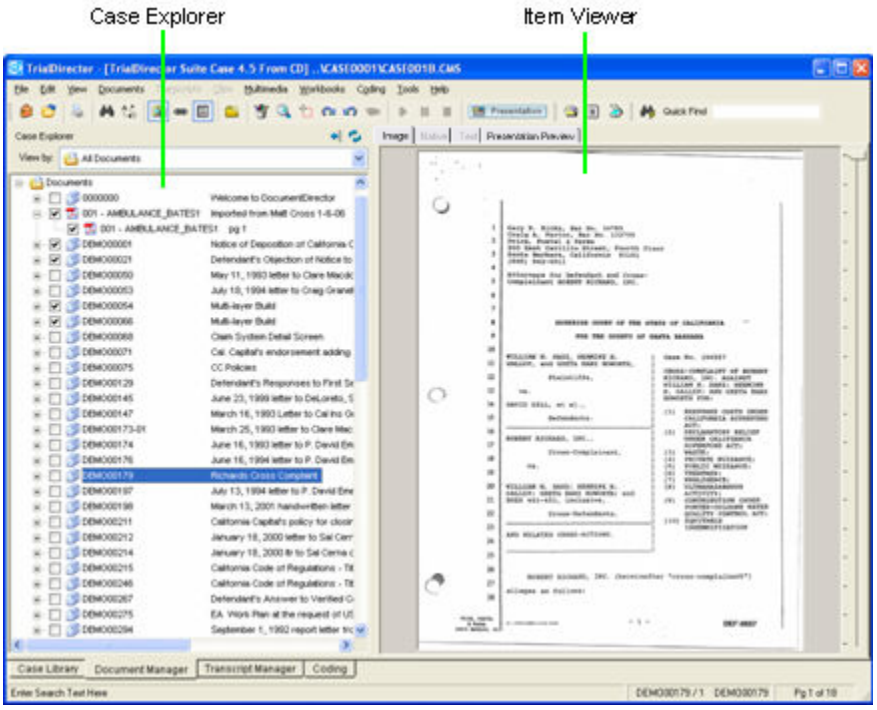
Depending on the type of item, one or more of the following tabs are available at the top of the Item Viewer:

- **Image** tab - Displays any supported image file and enables you to annotate the image.
- **Native** tab - Opens the program used to create the file and displays the fully functional version of the file within TrialDirector. This tab is unavailable (grayed out)

if native viewing is not supported for the file type, or if the program used to create the file is not installed on your computer.

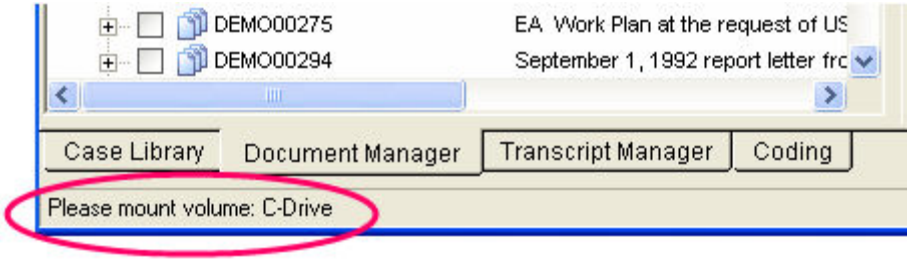
- **Text** tab - Displays full-text OCR for files that were scanned. Use this tab to edit the text if needed.
- **Presentation Preview** tab (Case Library Only) - Displays the presentation view of the item, where you can prepare and preview on-the-fly enhancements without impacting the actual presentation until you are ready to activate the changes.

Pages from PDF files are displayed both as static images on the **Image** tab (for annotation prior to trial), and as they appear in the fully functional PDF file on the **Native** tab. Many Advanced PDF Support features are available in TrialDirector.



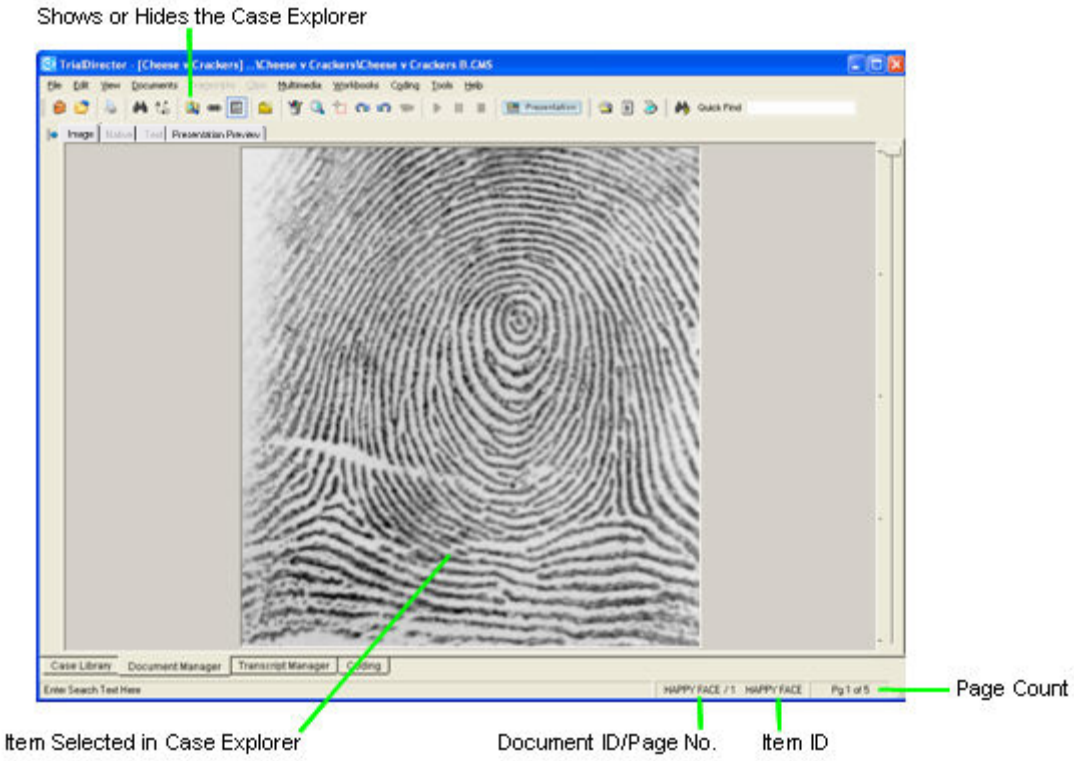
Item is Not Located on Your Computer ("Mount the Volume..." Message)

When you select an item to view and the CD or volume containing the item is not located on your computer, TrialDirector beeps and displays a message in the Status Bar that tells you which volume to load. Mount the correct volume and select the item again.



Full Screen Item Viewer (Hide Case Explorer)

The Item Viewer can be used without the Case Explorer, allowing more room on the desktop for side-by-side image and database exhibit review with a third-party document management system. To use the Item Viewer without the Case Explorer, click the **[Shows or Hides Case Explorer]** button , as shown in the figure below.



When using the Item Viewer alone, you can navigate between items using the **[Page Up]** and **[Page Down]** keys.

What do you want to do?

- Work with Images
- Work with Multimedia Files
- View Native Format (OLE) Files

Search for Items

Topics:

- Use the Search Command
- Use Clipboard Linking

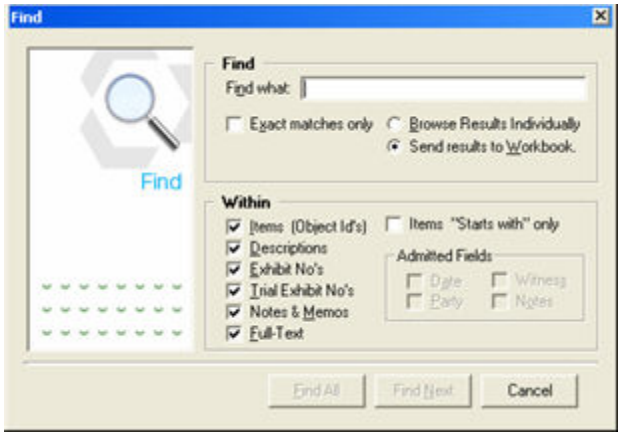
When using a large database, you will probably find it necessary to perform searches to locate specific items. Document Manager allows you to search for items using either the Search command for internal searches or clipboard linking for external searches.

Use the Search Command

The Search command allows you to search the Item ID, Description, Exhibit Number, Trial Exhibit Number, and Case Explorer fields, as well as any Notes and Memos associated with case items.

1. To begin an internal search, do one of the following:

   - Click **[Find]** on the main Toolbar.
   - Select **Find** from the Edit menu.



2. Type the information you would like to search for in the **Find What** field.

   Note: *The text is not case sensitive and the search ignores carriage returns and spaces. The only requirement is that the words are in the same order.*

3. Check the **Exact Matches Only** checkbox if you do not want to find partial matches (i.e., "exh" would not find "exhibit").

4. Do one of the following:

- Select **Browse Results Individually** if you want to jump to each matching record one at a time when the **[Find First]** button is clicked.
- Select **Send Results to Workbook** if you want to display all matching records in the Search Results workbook.

5. Check the boxes next to the fields you want to search.

Note: *The Admitted Fields search options will only be available when you have highlighted the Admitted workbook.*

6. Click **[Find First]** or **[Find All]** to begin the search.
7. Click **[Cancel]** to close the Find window.

Use Clipboard Linking

Most third-party document management systems can be used to locate documents in Document Manager by copying query results to the Windows Clipboard.

To illustrate the clipboard linking concept, the following example uses the Windows Notepad in place of any other Windows based product in which you might do a search and copy the resulting text to the clipboard.

1. Open Windows Notepad by clicking the Windows **Start | Run** command and typing "notepad."
2. Click **[OK]** to open the program.
3. Resize and move the Notepad window so you can view both Notepad and Document Manager.
4. Type the search text in Notepad window. Keep in mind that a valid Document Manager Item ID must be found within the first three words of the search text.
5. Highlight the selected text.
6. Press **[Control]** + **[C]** to copy the search text to the Windows Clipboard. Document Manager automatically displays the correct item.

Note: *Document Manager will perform a search on any text that is copied to the clipboard. You can disable clipboard monitoring on the General tab in the Document Manager Options window.*

More Information:

- Exhibit Management

Exhibit Management

As you organize your case in TrialDirector, you can assign Exhibit Numbers and Trial Exhibit Numbers to items, group related exhibits into workbooks, and more.

What do you want to do?

- Import Items into a Case
- Select Items
- Assign Exhibit Numbers or Trial Exhibit Numbers
- Insert a Page
- Insert / Remove a Document Break
- Attach Memos
- Put Items in a Workbook
- Search for Items
- Print Items
- Remove Items
- Remove a Volume
- Create a Subset Case

Adding Items to a Case

You can add (or import) items at any time into an open case using one or more of the following methods: drag and drop, manual import, batch import, and scan import.

What do you want to do?

- Drag and Drop Items into the Case
- Manually Import Items
- Use a Batch File to Import Items
- Scan Items into the Case

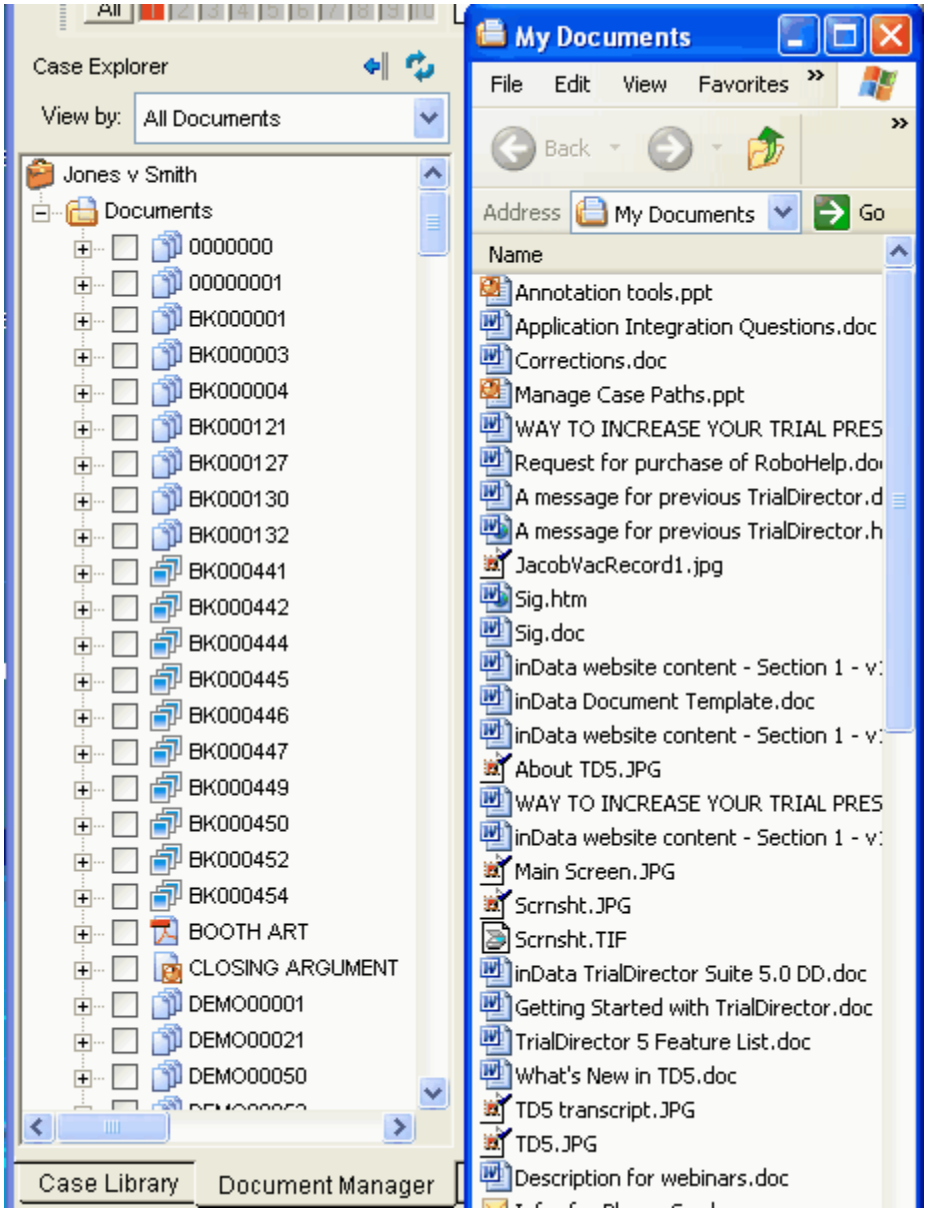
More Information:

- Exhibit Management
- Import Items

Drag and Drop to Add Items

One of the easiest ways to import items into a case is to drag and drop items into the Case Explorer from the Microsoft Explorer window.

1. Open Microsoft Explorer and position the window so that you can also see the Document Manager Case Explorer, as shown in the figure below.



2. Select one or more items that you would like to add to the case.

3. Click and drag the items over to the Document Manager Case Explorer and release the mouse button.

The file names are automatically used as the Item ID's (e.g., exh001.tif would become Item ID exh001), with any prefix you have assigned.

More Information:

- Exhibit Management

- Import Items

Manually Import Items

Topics:

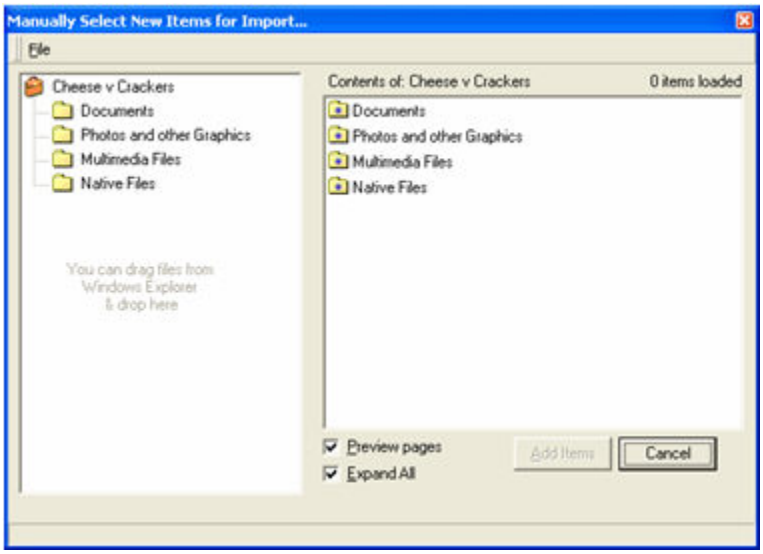
- Manually Import Items
- Queue Items for Import
- Add Pages to a Queued Document
- Rename Queued Items
- Remove Queued Items
- Sort Queued Items
- Import Queued Items into a Case
- Create a Load File from Queued Items

The Document Manager allows you to manually select individual files to import into a case.

Note: *If you have many items to import, it may be preferable to import using a batch file. Manually importing items is the best choice for importing a small number of items.*

Manually Import Items

1. From the Documents menu, select **Import New Items from... | Manual Selection Dialog**.



The Manually Select New Items for Import window consists of two panels. The panel on the left has folders containing the items you have selected to be imported into the case. The panel on the right allows you to select the items you want to add and preview items that have already been queued.

Queue Items for Import

To select the items you want to import into a case, follow these steps:

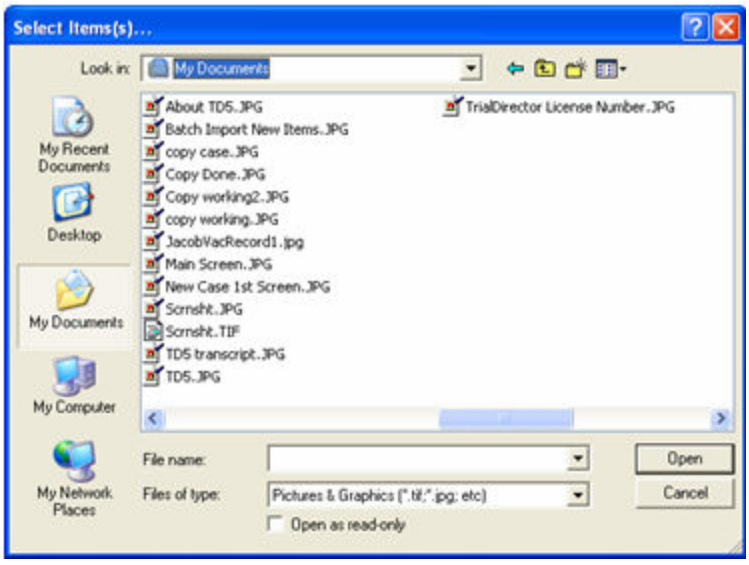
1. Decide which item type you would like to add:

Item Type	Description
Documents	Scanned B&W images and ASCII text files.
Photos and Other Graphics	Photos, charts, or other graphics.
Multimedia Files	Video, DVT clips and animations.
OLE Objects	Native file documents, such as Adobe Acrobat and Microsoft PowerPoint presentations.

2. Do one of the following:

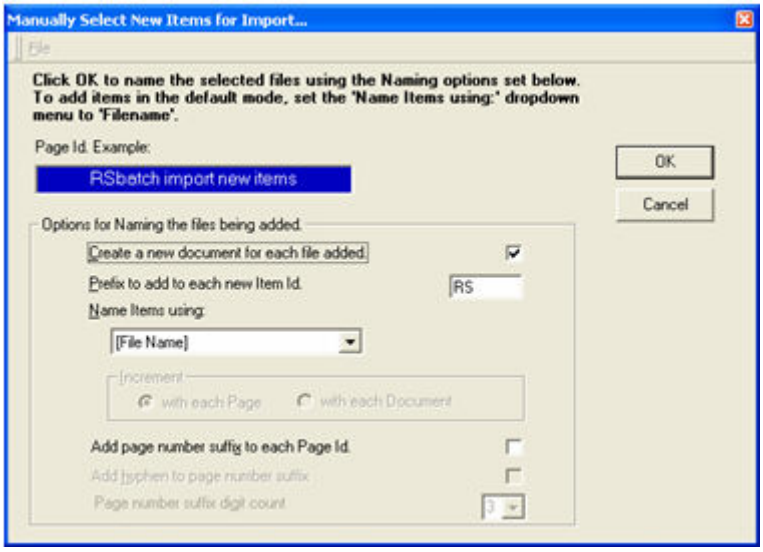
- Right-click or double-click on the desired item type in the panel on the right. A pop-up menu will appear, which will allow you to select the Add option for the selected item type.
- Select the desired item type folder in either panel, then select **Add Items** from the File menu.

After you have made your selection, a **Select Items** window will appear so that you can choose the files to add.



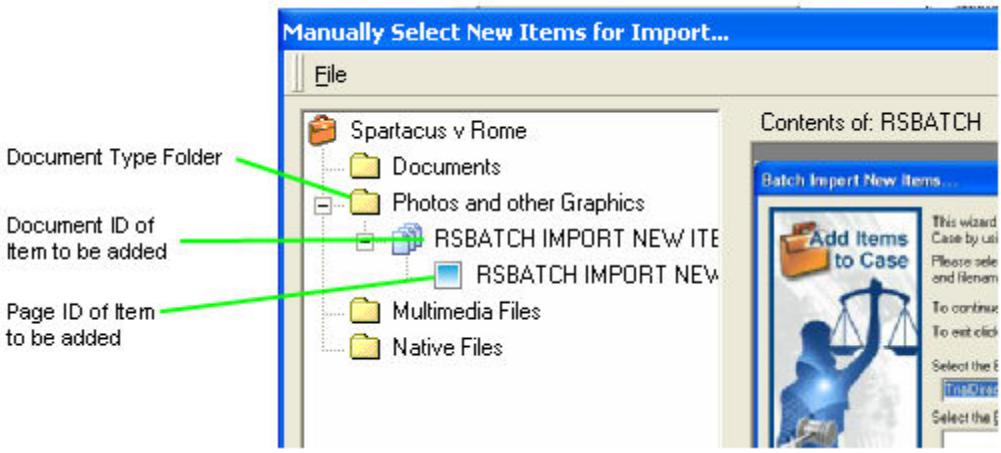
3. Select one item by clicking on it, or select multiple items by holding down the Control key and clicking on each item. Click **[Open]**.

4. A file naming screen opens, displaying the file name that will be added to TrialDirector. Options allow you to:
    - Create a new TrialDirector document for each file added
    - Add a prefix to each file name
    - Select alternate file names
    - Add page number suffixes


Manually Select New Items for Import...
File
Click OK to name the selected files using the Naming options set below. To add items in the default mode, set the 'Name Items using:' dropdown menu to 'Filename'.
Page Id. Example:
RSbatch import new items
OK
Cancel
Options for Naming the files being added.
Create a new document for each file added.
Prefix to add to each new Item Id.
RS
Name Items using:
[File Name]
Increment
with each Page
with each Document
Add page number suffix to each Page Id.
Add hyphen to page number suffix
Page number suffix digit count

5. Click **[OK]** to accept the filing naming options. The items that you selected are displayed in the left panel in the folder hierarchy. The right panel displays the first item in your selection list. You can click on the individual items to display them in the viewer, and right-click on an item to remove it or rename it.
6. Click **[Add Items]** to confirm your selections.

After you have accepted the items, they will be placed in the appropriate folder in the window on the left. You may notice that the folder now has a plus **[+]** sign next to it, indicating that it has contents. Click on the plus **[+]** sign or double-click the folder to view the contents.



The items will be listed under a single Document ID or multiple Document IDs, depending on whether you chose to add the items as single page documents or a multiple page document.

Add Pages to a Queued Document

1. To add an item to a document that has already been queued for import, select the target document in the window on the left.
2. In the window on the right, right-click on an item and select **Insert Pages Before Page (Item ID)**.
3. When the **Select Items** window appears, select the item(s) you want to add and click **[Open]**.
   The items will be inserted into the selected document.

Rename Queued Items

Rename any of the Document IDs or Page IDs before adding the items to the case by right clicking once on the desired page ID to enable edit mode.

Remove Queued Items

To remove a queued document, right-click the document you want to remove and select **[Remove]** from the drop-down list.

To remove a queued page, do one of the following:

- In the panel on the left, right-click the page you want to remove and select **Remove** from the drop-down list.
- In the panel on the left, select the document that contains the page you want to remove. Then, in the panel on the right, right click on the item you want to remove and select **Delete** from the drop-down menu.

The item will be removed from queue, but the source file will not be deleted from your computer.

Sort Queued Items

1. In the left panel, right-click on any one of the items in the folder you want to sort.
2. Select **Sort** from the drop-down menu.

Items will be sorted in alphanumerical order.

Import Queued Items into a Case

After you have selected all of the items you would like to import into the case, click the **[Add Items]** button.

Note: *If you click* ***[Cancel]*** *instead, a message box will appear, confirming you that you DO NOT want to add the selections. If you choose YES, the* ***Select New Items to Import*** *window will close and your selections will be lost. If you choose NO, you will be returned to the Select New Items to Import window.*

Create a Load File from Queued Items

Queued items can be saved as an object load list so that the items can be imported into the case using the batch file at a later time.

To save the current queued items as an object load list, select **Save Selected Item(s) to Import Batch File** from the File menu.

When the navigation window appears, browse to the folder where you would like to save the load file, type in a filename with an *.oll extension, and click **[Save]**

More Information:

- Exhibit Management
- Import Items

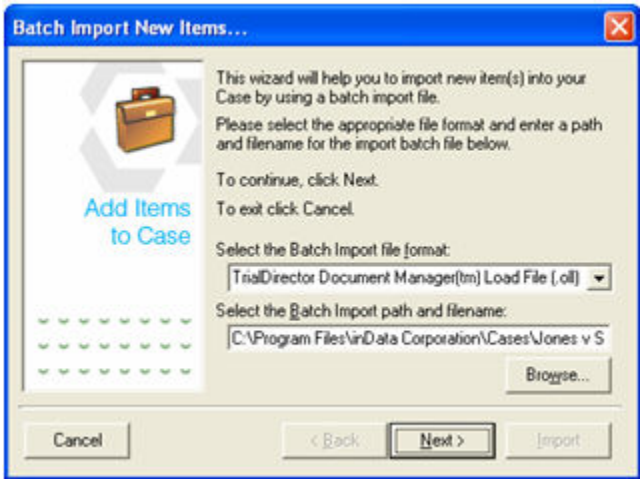
Import Items Using a Batch File

A batch file is essentially a list of the items you want to import into the case. TrialDirector reads a special kind of batch file, called an object load list (*.oll). Object load lists can be manually created using a text editor or automatically created from TrialDirector when importing files from another case. The FileBridge utility under the Tools menu can also be used to convert load files that were formatted for other applications and use them with TrialDirector.

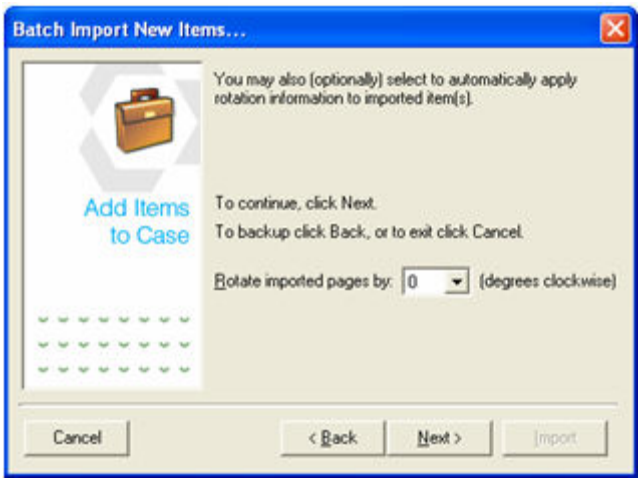
Case items can also be loaded using other kinds of batch files that TrialDirector temporarily converts into readable object load lists. Other formats currently supported are: TrialDirector database files (*.mdb), CT Summation iBlaze® Document Information Index files (*.dii), IPRO Load files (*.lfp), DocuLex™ Volume Contents files (*.txt), DocuLex™ Database Files (*.dbf), Opticon v2.0 ImageBase Load Files and Generic Image Load files (*.log). Check to see if your image volume has a batch file before deciding to load items using another method.

Note: If you are adding items from a volume that you have exported from TrialDirector, use the database file (*.mdb) rather than the object load list (*.oll) so that any annotations on the items will appear.

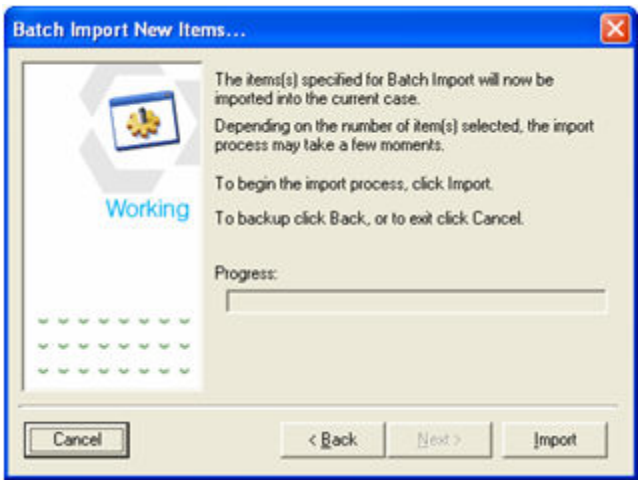
1. Select **Import New Items from... | Batch file Import** from the Items menu.


Batch Import New Items...
This wizard will help you to import new item(s) into your Case by using a batch import file.
Please select the appropriate file format and enter a path and filename for the import batch file below.
To continue, click Next.
To exit click Cancel.
Add Items to Case
Select the Batch Import file format:
TrialDirector Document Manager(tm) Load File (.oll)
Select the Batch Import path and filename:
C:\Program Files\inData Corporation\Cases\Jones v S
Browse...
Cancel
< Back
Next >
Import

2. In the first field, select the type of batch file you are importing.
3. In the second field, type the path and filename of the batch file you are using (for example, C:\images\load.oll) or click **[Browse]** to locate the file.
4. Click **[Next].**


Batch Import New Items...
You may also (optionally) select to automatically apply rotation information to imported item(s).
Add Items to Case
To continue, click Next.
To backup click Back, or to exit click Cancel.
Rotate imported pages by: 0 (degrees clockwise)
Cancel
< Back
Next >
Import

5. If the items you are importing need to be rotated, select the number of degrees (clockwise) the images should be rotated.
6. Click **[Next]**
7. When you are ready to import the items from the batch file, click **[Import]**. The duration of the import process depends on the number of items to be imported.


Batch Import New Items...
The items(s) specified for Batch Import will now be imported into the current case.
Depending on the number of item(s) selected, the import process may take a few moments.
To begin the import process, click Import.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Import

8. When the process is complete, click **[OK].**

If there were no errors during the import process, the imported items will now appear in the Case Explorer. The information in the load file provides the data for the Case Explorer fields and determines which tabs the items are displayed on.

More Information:

- Exhibit Management
- Import Items

Scan Items into a Case

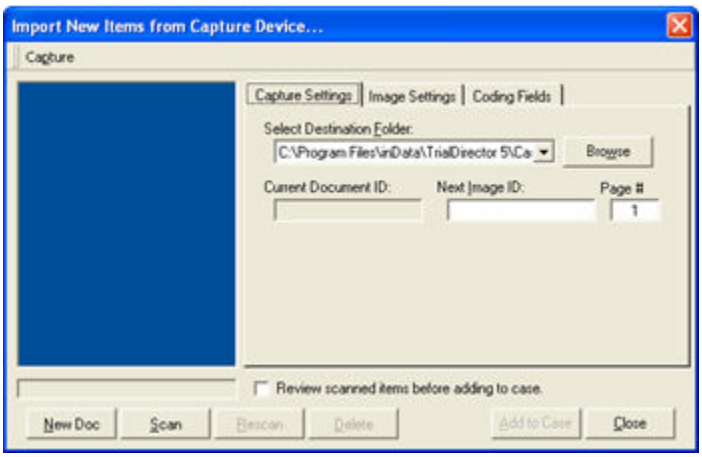
Topics:

- Select a Scanner

If you have a TWAIN compatible scanning device, you can scan images and import them into the open case.

1. Select **Import New Item(s) from....| Capture Device (TWAIN Scanner)** from the Documents menu. The Import window opens, with three tabs for document settings.

   Note: *If the Title Bar of the Import window says, "No Twain scanner sources are available," you need to install your scanner. Consult the user manual for your scanner for more information.*



2. On the Capture Settings tab, set the following:

Option	Description
Select Destination Folder	Allows you to select the path where you would like to save the images. The current case path plus Capture\Scanner is the default path. To modify the path, select Change Scan Destination Folder from the Scanner menu. Each image filename will consist of the Image ID and the extension, which depends on the Image Colors selected (*.tif, *.gif, or *.jpg). ***Note:*** *The next time you enter Scan mode, the default path will be most recent path used.*
Current Document ID	Displays the Document ID for the document currently being scanned. The Document ID will be the same as the Image ID of the first page of the document. It is filled in automatically after the Image ID has been set and the **[New Doc]** or **[Scan]** button is clicked.
Next Image ID	Allows you to assign an Item ID (up to eight characters) to the next page scanned. When scanning multiple pages to the same document, the Image ID increments automatically, although you can manually edit it at any time.
Page #	Indicates the page number of the image you are scanning. When scanning multiple pages to the same document, the page number increments automatically.

3. On the Image Settings tab, set the following:

Option	Description
Use Manual Scanner Controls	Allows you to launch the Twain software associated with your scanner, which may allow you more detailed control

	over the scan process ***Note:*** *There is variation in compliance with the Twain interface requirements among various scanner manufacturers. These variations may affect or disable the functionality of some scanning features.*
Use Automatic Document Feed (ADF)	Allows you to set the scanner to use automatic document feed or allow batch scanning.
Deskew B&W Text	Allows you to deskew black and white document (text) images as they are scanned.
Duplex Scan	For printers with duplex (double-sided) scanning, captures both sides of the document.
Color Depth	Allows you to choose a file format and color palette: black & white (1 bit per pixel, .TIF image), 256 color (8 bit per pixel, .BMP image) or true color (24 bit per pixel, .JPG image).
Resolution (DPI)	Allows you to determine the resolution, or number of dots per inch, of the scanned image. ***Note:*** *The combination of high bit per pixel Image Colors and high DPI settings may create large images, which require more time to load and may not display due to memory constraints.*
Paper Size	Allows you to set the paper size for the item.

4. On the Coding Fields tab, enter the following optional information for the coding database:

Option	Description
Title	Allows you to specify a title for the document.
Author	Allows you to record the author or authors of the document.
Recipient	Allows you to record the recipient of the document
Date	Allows you to record the document date.
Source	Allows you to record the source of the document.
Type	Allows you to classify the document by type (letter, hand-written note, response, notice, and so on).
Clear Coding History	Click this button to clear the entries in the fields above.
Clear fields when starting new	Select this check box to automatically clear the fields when scanning a new document.

document	

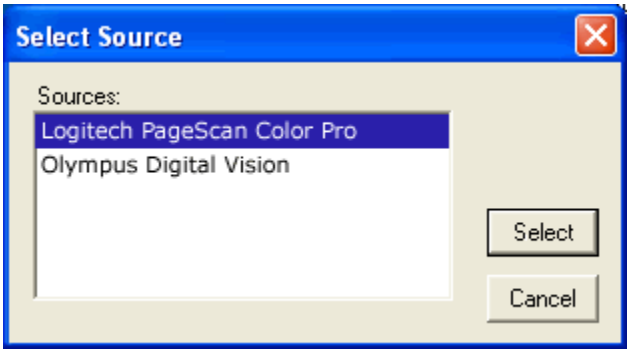
5. At the bottom of the window, a check box allows you the option of reviewing each item before accepting it. (The scanned image appears in the window after scanning.) If this box is checked, you will click **Add to Case** to accept an image after scanning.
6. Click **Scan** to begin scanning a document. Buttons are provided for the following actions:

Option	Description
New Document	Allows you to specify a break between documents.
Rescan	Re-scans the current document.
Delete	Deletes the current scan, does not save the document.
Add to Case	Allows you to save scanned documents to the current case.
Close	Closes the Import New Items from Capture Device window.

Select a Scanner

Follow these steps to select a different scanner:

1. Select **Import New Item(s) from....| Capture Device (Twain Scanner)** from the Documents menu.
2. Choose **Select Capture Device** from the Capture Menu. A window similar to the following will appear, showing the available scanners installed on your system:



3. Choose a Twain compatible scanning device.
4. Click **[Select]** to select the scanner or **[Cancel]** to cancel the selection.

More Information:

- Exhibit Management
- Import Items

Insert Page

If you discover an imaged document in TrialDirector is missing a page because a scanning error or other problem occurred during the case organization phase, you can quickly insert the missing page. TrialDirector will assign a page ID for the inserted page with the appropriate suffix after it. (For example, if you insert a page between EX002 and EX003, the new page becomes EX002A and the new sequence is EX001, EX002, EX002A, EX003, etc.)

Note: You cannot insert pages into PDFs or multi-page .TIF files. However, you can use TrialDirector to make a new PDF file from selected items.

Before you begin: If the missing page has not already been scanned, make sure the correct scanner is available and selected in TrialDirector (see Select a Scanner).

To insert a page:

1. In Case Explorer, expand the appropriate document group completely so that you can see the individual pages.
2. Select the page that should come right before the page you are inserting (in the example above, page EX002), right-click on it, and select **Insert Page** from the shortcut menu.

   The Insert Page dialog box appears.

   The Select ID for this page... box displays the default page ID with the appropriate suffix in the sequence (i.e. "A", "B", etc.), which you can change later if needed.
3. If the page has already been scanned, click **Browse** and locate the file. Otherwise, complete the following steps to scan the page:
   a. If needed, select **Show Controls When Scanning** to display the controls from your selected scanner.
      inData recommends you select this option if you need to enable ADF or similar advanced options.
   b. Once any needed scanner options are selected, click **Get Page From Scanner** and wait for the scanner to finish.
4. Click **OK**.

   The new page appears in Case Explorer.

More Information:

- Exhibit Management
- Adding Items to a Case
- Insert/Remove Document Break

Insert / Remove Document Break

A convenient feature in Document Manager is the ability to quickly insert or remove document breaks within the Case Explorer. This feature is beneficial when an existing document's page boundaries need to be changed on the fly.

Note: You cannot insert or remove page breaks in PDFs or multi-page TIF files. However, you can use TrialDirector to split multi-page TIF files into single-page TIF files through an export process.

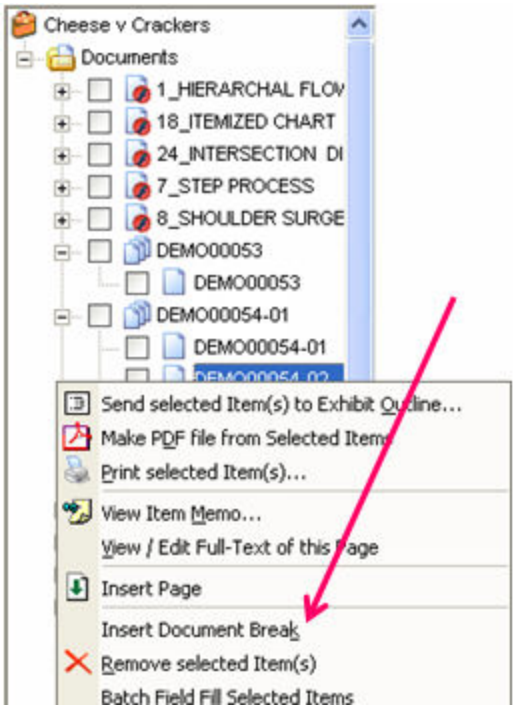
Topics

- Insert Document Break
- Remove Document Break

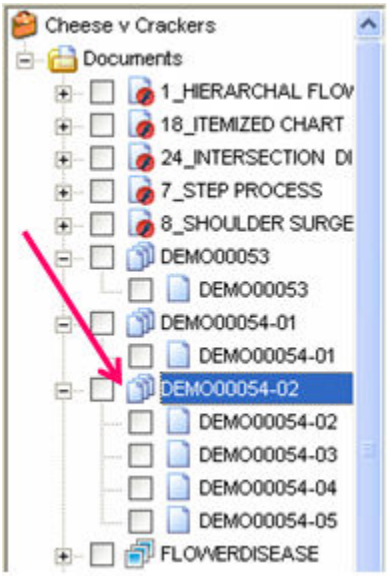
Insert Document Break

To insert a document break:

1. Select the page where you wish to create the new document.
2. Right-click and select **Insert Document Break** from the shortcut menu, as shown below. (Do not right-click directly on the desired page - click off to the side in the Case Explorer panel.)



The selected page (DEMO00054-02) is now set as Page 1 of a new document. The page numbering is reset (as shown below) and the remaining pages of the original document are now established as child objects of the new document.

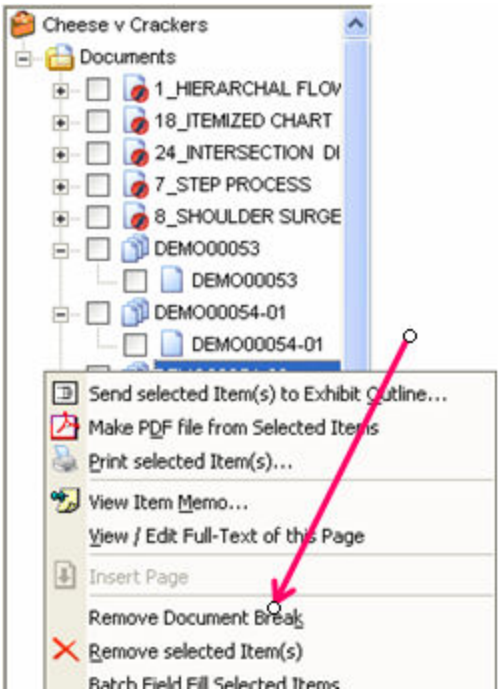


Remove Document Break

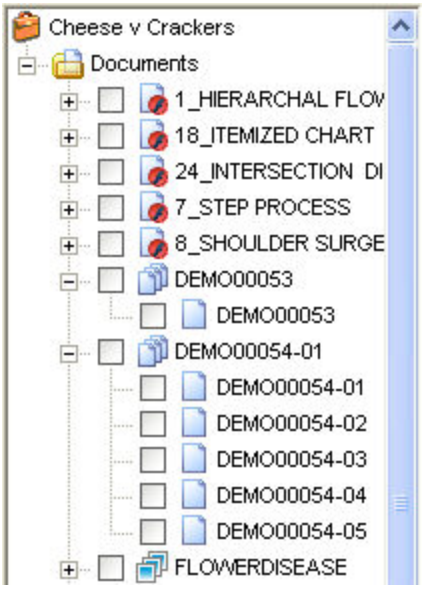
To remove a document break:

1. Select Page 1 of the document you wish to merge with the previous document.

2. Right-click and choose **Remove Document Break** from the shortcut menu, as shown below. (Do not right-click directly on the desired page - click off to the side in the Case Explorer panel.)



The selected document (DEMO00054-02) will be merged with the previous document (DEMO00054-01). The page count of document (DEMO00054-02) will be added to the new *master* document, as shown below. The page numbering will be reset to add the pages of the second document (DEMO00054-02) to the new *master* document, DEMO00054.



More Information:

- Exhibit Management
- Adding Items to a Case
- Insert Page

Create a Subset Case

The subset case feature allows you to use a batch file to select specific items and put them into a new case. This feature allows you to:

- Create a separate case that only contains the exhibits you are going to use in trial.
- Redefine document boundaries to match the document boundaries defined in a third-party database management system.
- Rename items with generic Item IDs for document production.

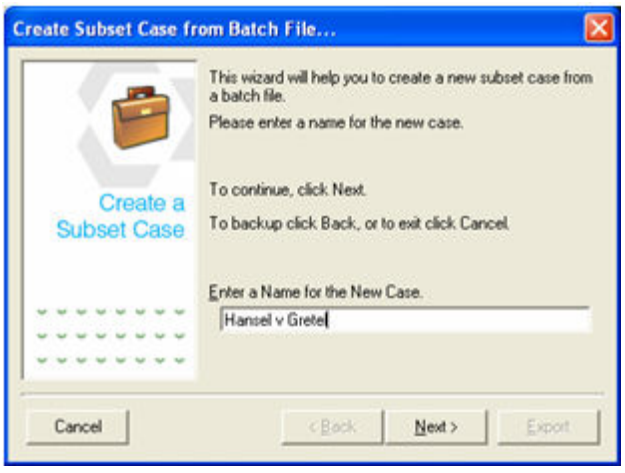
Note: *The sample Subset Case Batch File in Appendix A provides information on how to redefine document boundaries, rename items and assign Exhibit and Trial Exhibit Numbers using the subset case feature.*

Follow these steps to create a subset case:

1. Create a batch file listing the items you would like in the subset case, by doing one of the following:

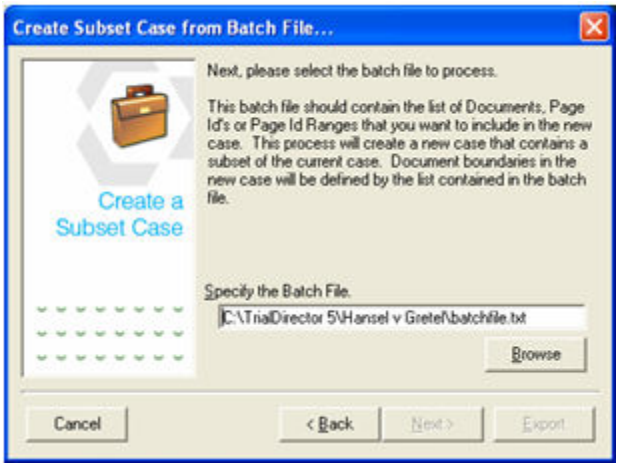
    - Type the subset case batch file manually.
    - Format a database query result to match the subset case batch file format.
    - Select items and create a batch file of the selected items.

2. Select **Create Subset Case From Batch file...** from the Documents menu.

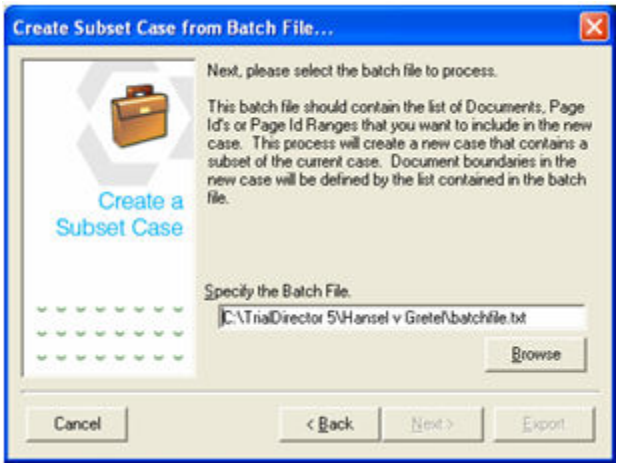

Create Subset Case from Batch File...
This wizard will help you to create a new subset case from a batch file.
Please enter a name for the new case.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Create a Subset Case
Enter a Name for the New Case.
Hansel v Gretel
Cancel
< Back
Next >
Export

3. Type a case name in the **Enter a Name for the New Case** field.

4. Click **[Next]** to continue.


Create Subset Case from Batch File...
Next, please select the batch file to process.
This batch file should contain the list of Documents, Page Id's or Page Id Ranges that you want to include in the new case. This process will create a new case that contains a subset of the current case. Document boundaries in the new case will be defined by the list contained in the batch file.
Create a Subset Case
Specify the Batch File.
C:\TrialDirector 5\Hansel v Gretel\batchfile.txt
Browse
Cancel
< Back
Next >
Export

5. In the **Specify The Batch File** field, type in the full path and filename of the batch file (for example: C:\TrialDirector 5\batchfile.txt) or click **[Browse]** to locate the file.
6. Click **[Next]** to continue.

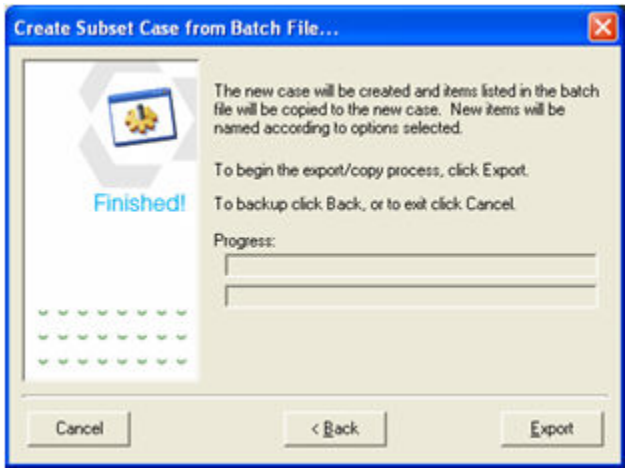

Create Subset Case from Batch File...
Next, please select the batch file to process.
This batch file should contain the list of Documents, Page Id's or Page Id Ranges that you want to include in the new case. This process will create a new case that contains a subset of the current case. Document boundaries in the new case will be defined by the list contained in the batch file.
Create a Subset Case
Specify the Batch File.
C:\TrialDirector 5\Hansel v Gretel\batchfile.txt
Browse
Cancel
< Back
Next >
Export

7. Select the **Include item memos in new case** option if you wish to export any memos that may be associated with the items that are exported.
8. Select the format of your batch file: Document Entries or Page Range Entries.

Note: *See the sample Subset Case Batch File in Appendix A for an explanation of each type of entry.*

Create Subset Case from Batch File...
You have the option of preseving the existing Id's of items included in the new case or you may assign new Id's by setting the 'Start Renaming with:' option. The starting Id will be incremented for each Document or Page depending on the Increment option selected below.
Verify the selected options. Click 'Next' to Continue.
Create a Subset Case
Start Renaming with:
HvG001
Increment name on each new document
Increment name on each new page
Increment using Leading Zeros
Include Page Builds
Cancel
< Back
Next >
Export

9. If you would like the items to be renumbered sequentially, type in the beginning number for the new naming convention (e.g., ABC001).
10. If you have entered a beginning number for the new naming convention, decide whether to increment the number at each new document or each new page.
11. If you want to include revisions, make sure that the **Include Page Builds** option is selected .
12. Click **[Export]** to begin creating the subset case.


Create Subset Case from Batch File...
The new case will be created and items listed in the batch file will be copied to the new case. New items will be named according to options selected.
Finished!
To begin the export/copy process, click Export.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Export

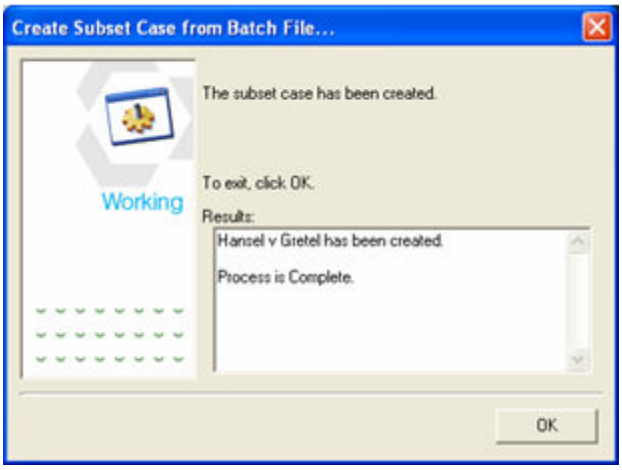
If errors occur during the process, a message will appear, asking if you want to view the problems list.

The problems list is saved in the original case folder. For example, if you create a subset case from the demonstration case (Case0000), the error file will be saved as Case0001.ERR (where Case0001 is the subset case number) in the Case0000 folder.

Possible problems include items that are listed more than once (two items can not have the same Item ID) and items that are not found in the case.

Note: *See the sample Problems List in Appendix A.*

13. When the process is complete, a message appears, telling you that the subset case has been created successfully. Click **[OK]** to complete the process.



You will now be able to open the subset case as you would any other case.

Note: *Items in the subset case will not retain memo attachments.*

When the subset case is created, a cross-reference file is created and stored in the original case folder. For example, if you create a subset case from the demonstration case (Case0000), the cross-reference file will be saved as Case0001.XRF (where Case0001 is the subset case number) in the Case0000 folder.

More Information:

- Sample Files: Subset Case Batch File
- Exhibit Management

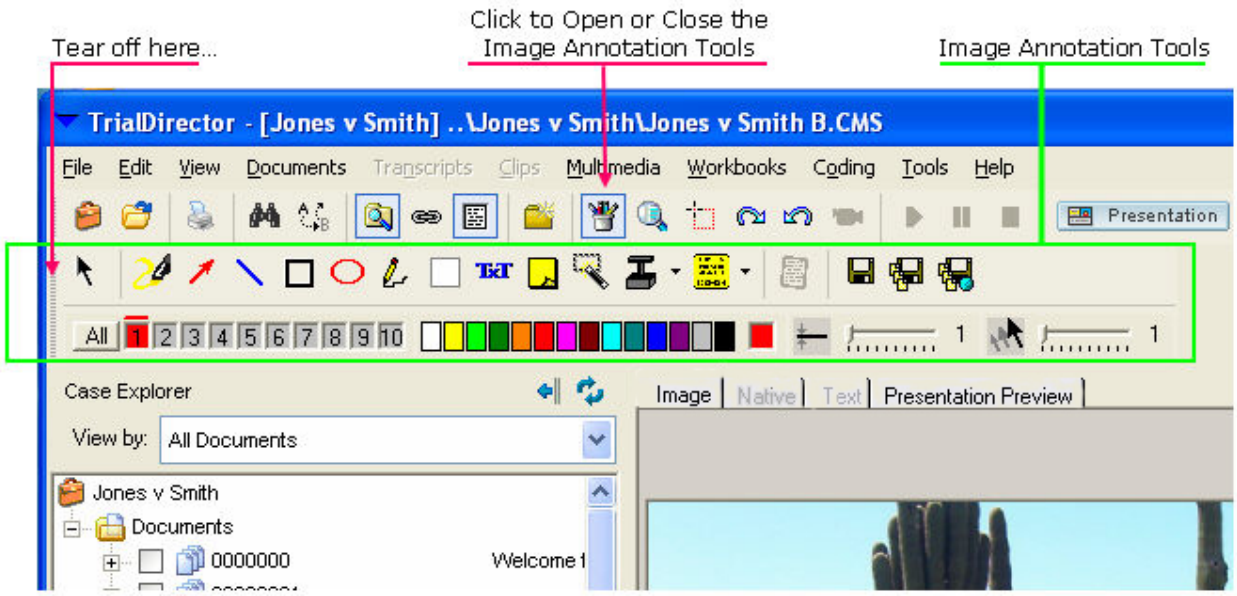
Annotations (Markups)

The Image Annotation Tools are available if the item type is an imaged document or photograph. Use the tools to draw arrows, lines, circles, rectangles, and other markups. Although you can annotate images "on the fly" in Presentation mode, pre-treating images enables you to save the annotations and load annotated images quickly in Presentation mode.

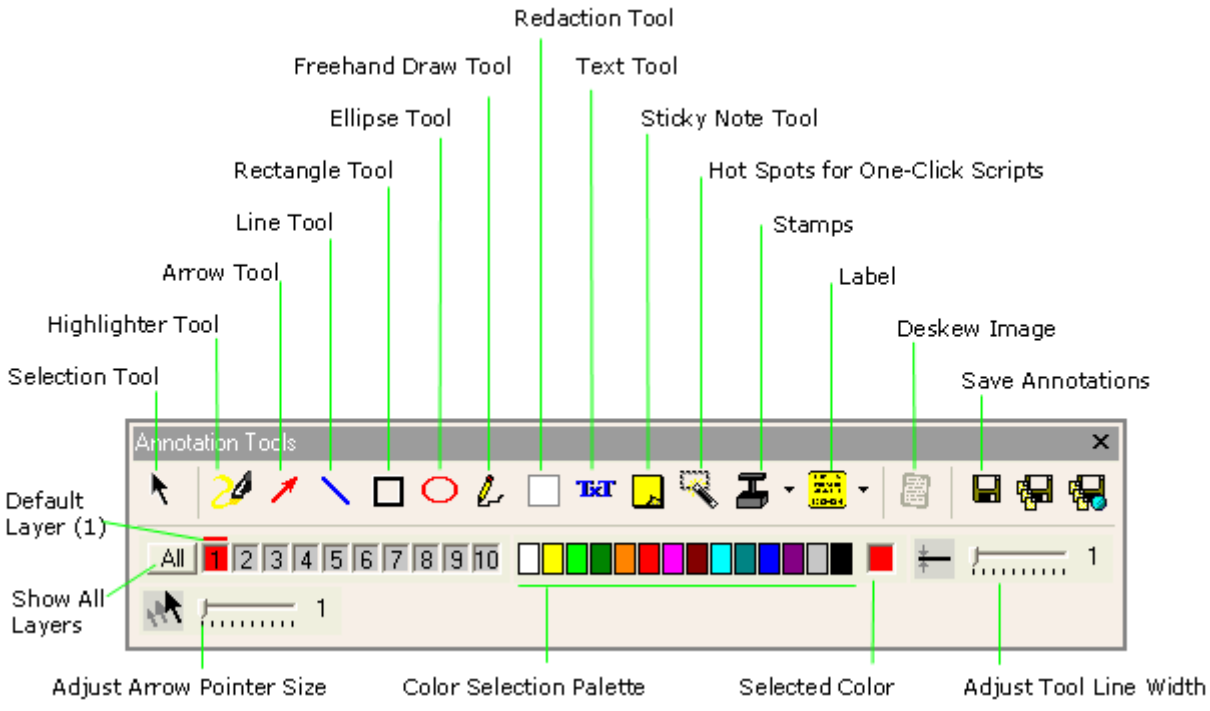
To open the Annotation Toolbox, do one of the following:

- Click the button on the Toolbar.

- Select **Show Image Annotation Toolbar** from the Documents menu.


Tear off here...
Click to Open or Close the Image Annotation Tools
Image Annotation Tools
TrialDirector - [Jones v Smith] ..\Jones v Smith\Jones v Smith B.CMS
File Edit View Documents Transcripts Clips Multimedia Workbooks Coding Tools Help
Presentation
All 1 2 3 4 5 6 7 8 9 10
Case Explorer
View by: All Documents
Jones v Smith
Documents
0000000
Welcome1
Image Native Text Presentation Preview

The image annotation tool bar can be "Torn off", resized or moved around to a convenient location of your choosing. The diagram below outlining the available annotation tools shows the toolbar after it has been torn off and resized.



The appearance of the Toolbox changes depending on the annotation tool selected. The functionality of each of the annotation tools is described in the following sections.

To close a torn off Annotation Toolbox, click the **[X]** in the upper-right corner.

Note: *If no annotation tools are enabled, you are in the normal rubber-band zoom mode.*

What do you want to do?

Click on the headings below for annotation tool instructions.

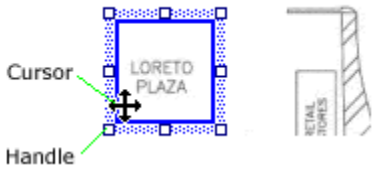
The Selection Tool

Use the Selection tool to select an annotation or markup to edit, resize, move or delete.

Once the Selection tool is enabled, there are two ways to select an existing markup:

- Click anywhere on the markup.
- Click and drag a rectangle around one or more markups. All markups completely within the area of the rectangle are selected.

When an annotation or markup is selected, a box appears around it with handles on the corners and sides. When you move the cursor over a handle, the cursor changes to a double-pointed arrow, allowing you to resize the selected markup. When you place the cursor over the selected markup, the cursor changes to a four-sided arrow, allowing you to move the markup to another location.



In order to resume normal rubber-band zoom mode, you must disable the Selection tool by clicking it again.

Note: *When moving or resizing a markup, the markup sometimes partially or completely disappears. Click anywhere outside the markup to refresh the screen and display the markup correctly.*

Highlight an Image

Use the Highlighter tool to highlight an important area of an image. When the Highlighter tool is selected, the Annotation Toolbox changes and displays a Color selection grid along the bottom.

Choose a color then click and drag the cursor in a rectangle around the area you want to highlight.

Draw an Arrow

Use the Arrow tool to draw an arrow pointing to an important point on an image. When the Arrow tool is selected, the Annotation Toolbox changes and displays Color, Line Width and Pointer Size selections.

Select the desired color, line width and pointer size and then position the cursor where you want the point or head of the arrow to appear. Click and drag the cursor away from the head in any direction to the desired length of the arrow.

Draw a Line

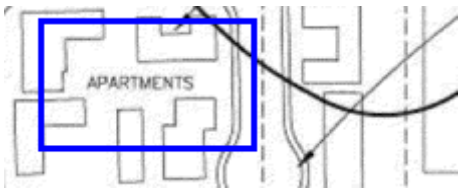
Use the Line tool to underline an important point on an image. When the Line tool is selected, the Annotation Toolbox changes and displays Color and Line Width selections.

Choose the desired color and line width and then click and drag the cursor below what you want to underline.

Draw a Rectangle

Use the Rectangle Box tool to place a rectangle or box around an important area of an image. When the Rectangle Box tool is selected, the Annotation Toolbox changes and displays Color and Line Width selections.

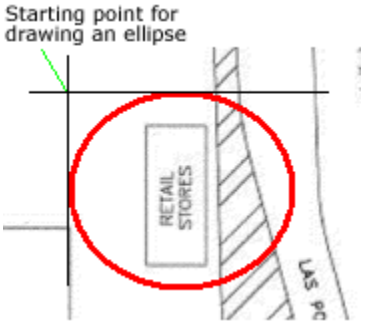
Choose the desired color and line width and then click and drag the cursor in a rectangle around the area you want to box in.



Draw an Ellipse

Use the Ellipse tool to place an ellipse or circle around an important area of an image. When the Ellipse tool is selected, the Annotation Toolbox changes and displays Color and Line Width selections.

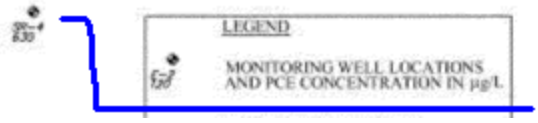
Choose the desired color and line width and then click and drag the cursor around the area you want to encircle. The starting point will not be on the ellipse; it will be the maximum height and farthest left position of the ellipse as shown below.



Draw a Freehand Line

Use the Freehand tool to Use draw a freehand line on an image. When the Freehand tool is selected, the Annotation Toolbox changes and displays Color and Line Width selections.

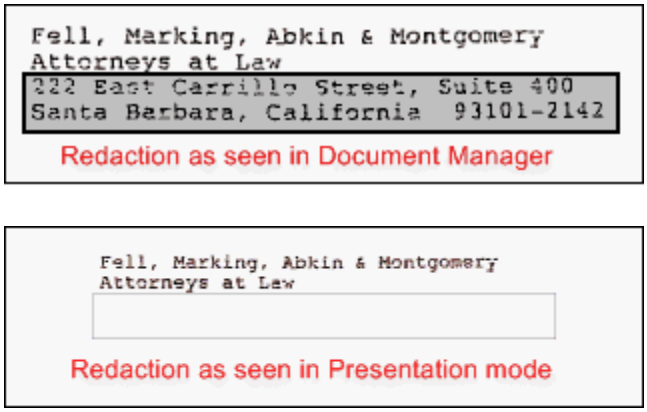
Choose the desired color and line width and then click and hold the mouse button and drag the cursor to draw.



Set a Redaction

Use the Redaction tool to redact or cover a portion of the image. The Annotation Toolbox does not change when the Redaction tool is selected.

Click and drag the cursor in a rectangle around the area you want to redact and a gray box will cover the selected area. The area inside the gray box will still be visible while you are in Document Manager. When the image is opened in the TrialDirector Presentation mode, the area in the redaction box will be invisible.


Fell, Marking, Abkin & Montgomery
Attorneys at Law
222 East Carrillo Street, Suite 400
Santa Barbara, California 93101-2142
Redaction as seen in Document Manager
Fell, Marking, Abkin & Montgomery
Attorneys at Law
Redaction as seen in Presentation mode

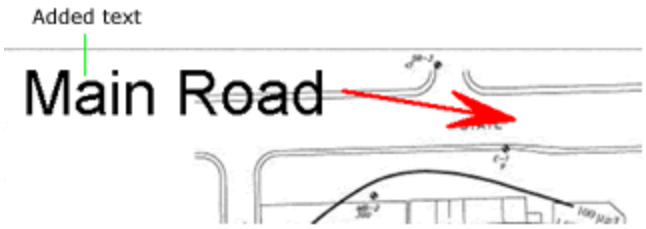
Redactions are temporary overlays on the image while in the program. There are three ways to make a redaction permanent:

- Print the image with markups (see Print Images).
- Export the image with markups (see Export Folder Contents to a Volume).
- Perform a Grab Window in TrialDirector.

Add Text

Use the Text tool to add text to an image. When the Text tool is selected, the Annotation Toolbox changes and displays a color selection grid along the bottom.

Choose the desired text color and then click and drag the cursor in a rectangle around the area where you would like to place the text. Type the text and click elsewhere on the image when you are done. The box disappears, leaving only the typed text.



Edit the Text in a Text Box

To edit the text in a text box, select the text box using the Selection tool and then double-click on the box to enter edit mode. The cursor will appear at the left side of the text inside the box. Position the cursor where you would like to change or add text and begin typing. The text box is always in insert mode. Click elsewhere on the image when the changes are complete.

Change the Font in a Text Box

To change the font, font color, or size of the text, select the text box using the Selection tool and then right-click on the box and select **Choose Font** from the drop-down menu.

Select the desired font, color and size for the text. Click **[OK]** to save the changes or **[Cancel]** to abandon the changes.

Adjust the Angle of Text in a Text Box

To adjust the angle of the text, select the text box using the Selection tool and then right-click on the box and select **Adjust Angle** from the drop-down menu.

Slide the slider bar to the left or right to change the angle at which the text is displayed inside the box. Click **[OK]** to save the changes or **[Cancel]** to abandon the changes.

The text is rotated clockwise relative to the upper-left corner of the text box. The text may exceed the boundaries of the text box since the text box remains in the original position regardless of the position of the angled text.

Set the Background Color of a Text Box

To set the background color, select the text box using the Selection tool and then right-click on the box and select **Set Background Color** from the drop-down menu.

Select a color and click **[OK]** to save the changes or **[Cancel]** to abandon the changes. The background mode must be tinted or opaque to display the color.

Set the Background Mode of a Text Box

To change the background mode, select the text box using the Selection tool and then right-click and select **Set Background Mode** from the drop-down menu.

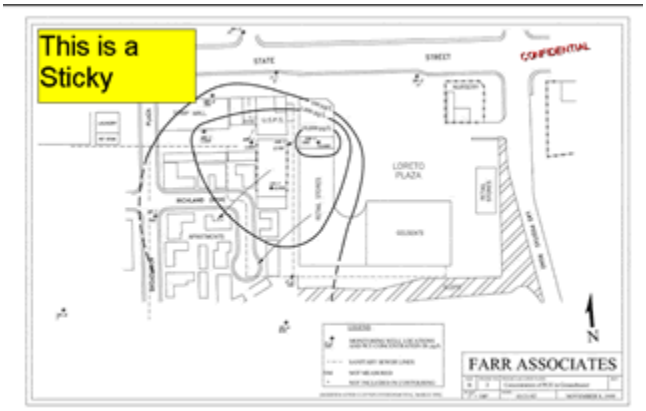
The following options are available:

Option	Description
Opaque	The background color is solid.
Tinted	The background color is visible, but the image area behind the text box shows through.
Transparent	The background color is invisible.

Select the desired background mode and click **[OK]** to save the changes or **[Cancel]** to abandon the changes.

Add a Sticky Note

Use the Note tool to place a note on the item. When the Note tool is selected, the Annotation Toolbox changes and displays a color selection grid along the bottom.



Choose the desired color for the background of the note then click and drag the cursor in a rectangle around the area where you would like to place the note. Type the text and click elsewhere on the image when you are done. Notes are useful for the clarification of illegible handwriting.

Edit the Text in a Note

To edit the text, select the note using the Selection tool and then double-click on the box to enter the edit mode. The cursor will appear at the left side of the text inside the box. Position the cursor where you would like to change or add text and begin typing. The note is always in an insert mode. Click elsewhere on the image when your changes are complete.

Change the Font in a Note

To change the font, color, or size of the text, select the note using the Selection tool and then right-click on the box and select **Choose Font** from the drop-down menu.

Select the desired font, color and size for the text. Click **[OK]** to save the changes or **[Cancel]** to abandon the changes.

Set the Background Color of a Note

To set the background color, select the note using the Selection tool and then right-click on the box and select **Set Background Color** from the drop-down menu.

Select a color and click **[OK]** to save the changes or **[Cancel]** to abandon the changes.

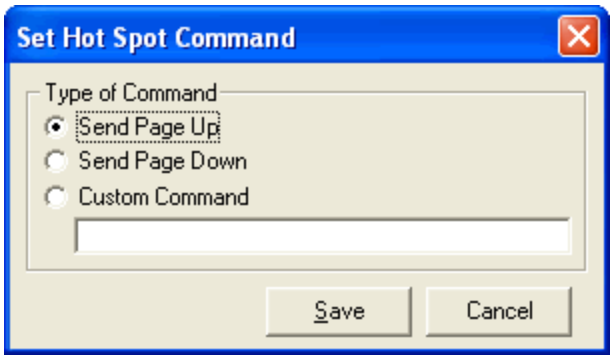
Note: *The background of a note is always opaque.*

Add Hot spot for one Click Scripts

The **Hot Spot for one click scripts** allows scripts to be placed on the exhibit and used during presentation mode.

To set a hot spot:

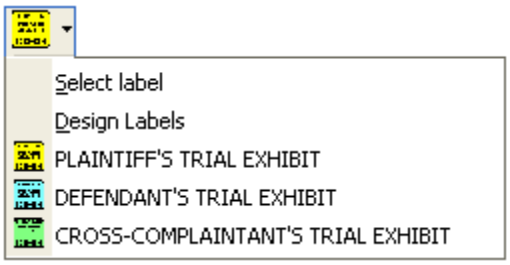
1. Select **Hot spot for one Click Scripts** from the annotation toolbar
2. Create a Hot spot on the exhibit by dragging on the area required
3. Double click on the area created to bring up the following screen



4. Set the Type of Command that the hot spot is required to carry out when clicked in presentation Mode
5. Click **[Save]**

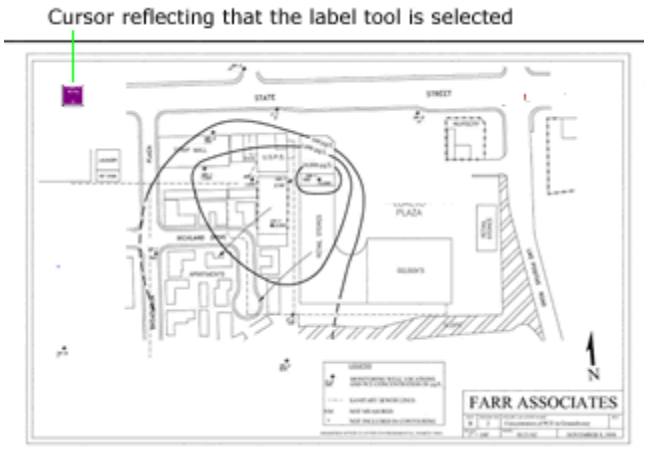
Add a Label

Use the Label tool to place a Label on the item. By clicking the down arrow on the right side a menu becomes available shown below:



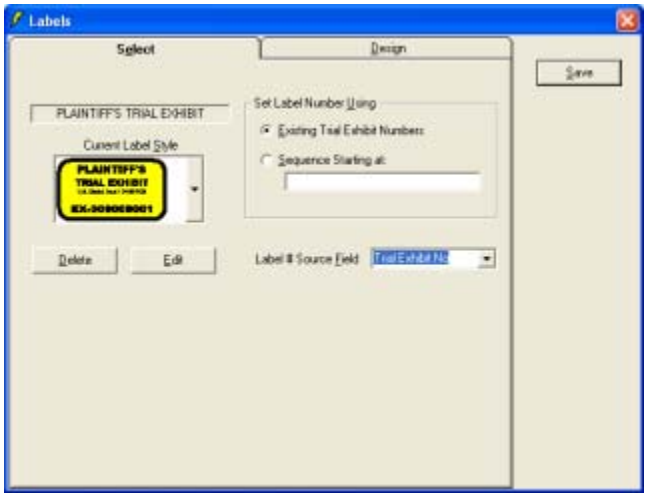
Applying and controlling a label

When the Label tool button is clicked, the Cursor changes to reflect that the label tool has been selected. Move the cursor to the area on the exhibit that you wish to apply the exhibit and click the left mouse button to apply the label



- To move a label Press **[Shift]** + left click on the label and drag it to the new place.
- To delete a label Press **[Shift]** + right click on the label.

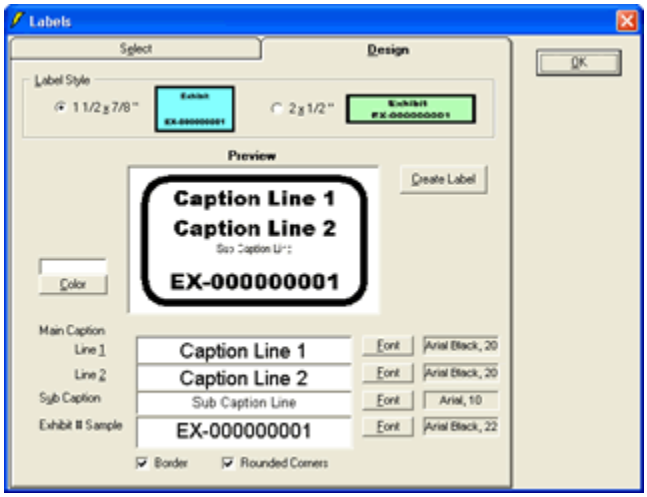
Select label



This option will allow you to manage existing labels that have been created. The tab allows you to:

- Edit/Delete a current label style
- Set the label number using:
  - Existing Trial Exhibit Number
  - Sequence starting of your choice
- Label # Source Field
  - Page Id
  - Trial Exhibit No.
  - Exhibit No.

Design Label



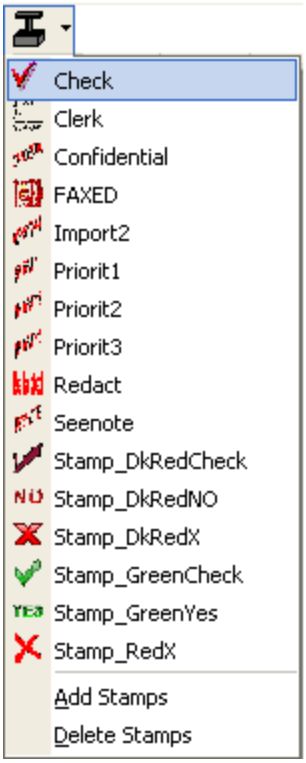
This option allows you to design labels, including:

- Label Style
- Color
- Font style
- Line captions
- Exhibit #
- border
  - Square/rounded corners.
- Preview window

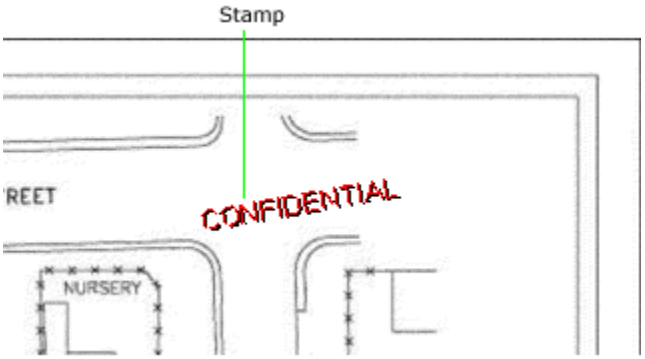
Once you have edited the label to your requirements click the **[Create Label]** button to create the label. Click **[OK]** to close the design window. The newly created label will be added to the existing drop-down list of choices.

Apply a Stamp

To use the Stamp tool to place a bitmap on an image, click the right arrow on the right side of the stamp toolbar icon. From the drop-down list, select which stamp you would like to apply.



To place a stamp on an item, click on the image where you want the stamp to appear. If you want to resize or move the stamp, use the Selection tool.



The stamp remains active until another tool is selected. Each time you click, the stamp appears on the image.

To Add a stamp to the palette select the **Add Stamps** from the stamp menu

To remove a stamp from the palette to make room for other stamps, select the **Delete Stamps** from the stamp menu.

Note: *Stamp objects are intended for use with bitmaps that use no more than the standard 20 Windows colors.*

Deskew an Image

When a hard copy document is scanned, the paper is sometimes twisted in the process, resulting in a distorted or "skewed" image. You can use the Deskew tool to improve the appearance and legibility of the image.

If an image in the view window appears to be skewed, simply click the deskew button and TrialDirector will attempt to improve the image.

Copy Markups

Markups can be copied or cut to the clipboard so that they can be pasted on the same or other images.

To copy a markup to the clipboard, select the markup with the Selection tool, right-click and select **Cut** or **Copy** from the drop-down menu. If you select **Cut**, the original markup will be deleted. If you select **Copy**, the original markup will remain in place.

To paste a markup from the clipboard, right-click on the target image and select **Paste** from the drop-down menu. The markup will be pasted in the same position as the original markup.

Remove Markups

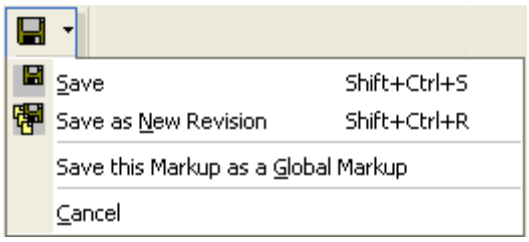
Follow these steps to remove an annotation or markup:

1. Choose the Selection tool from the Annotation Toolbox.
2. Click on the markup you want to remove. Handles appear to indicate it is selected.
3. Press the **[Delete]** key or right-click and select **Delete** from the drop-down menu.

To delete multiple markups at the same time, use the Selection tool to click and drag a rectangle around all of the markups you want to delete. All markups that are completely within the area of the rectangle become selected and will be deleted when you press the **[Delete]** key or right-click and select **Delete** from the drop-down menu.

Save Markups

Markups must be saved in order for them to appear the next time the image is displayed on the Image tab or loaded in Presentation mode. To save the markups, press the **[Save]** button on the Annotation Toolbox.



Do one of the following:

- Select **Save** to save the markups directly to the original image.

  For example, if you choose not to create a new revision for Ex000293, the markups will be saved to the original image so that the next time you view Ex000293 in TrialDirector, the markups will appear.

- Select **Save as Revision** to create a marked up copy of the original.

  For example, if you choose to create a new revision for Ex000293, the markups will not be saved to the original image. Instead, TrialDirector will create a sub-item underneath the original item in the Case Explorer, which will have the same name as the original with an added extension (e.g., Ex000293-001). Subsequent revisions will be automatically incremented.

Note: *If you create multiple revisions and then delete one, the other revisions are not renumbered.*

- Select **Save this Markup as a Global Markup** to save the selected markup as the global markup.

Note:*To avoid confusion, it is recommended that you only apply one markup to an image when you are creating a global watermark.*

- Select **Cancel** if you do not want to save the markups at all.

Create Layers

More experienced users can create multi-layer markups that can be defined during the pre-treatment of items prior to the trial presentation.

During a trial when you are using Presentation Mode to display the items, you may want to create some special effects on an item. For instance, you may want to move a highlight from paragraph to paragraph as you review important points. Or you may want to begin with a highlighted section and add each paragraph one by one during the presentation to build a large highlighted section. You create these effects during the pre-treatment process by defining annotation layers. Each annotation tool allows you to select which layer you

want the annotation or markup to display on. Then during the trial presentation, you move from one layer to another with the **Next (-NO) or Previous Overlay (-PO)** commands. This gives the appearance of stepping through the document.

For example, open *DEMO00054* and then press**[Ctrl]** + **[Page Down]**. This applies the next overlay, allowing you to view the original document and then the marked up document.

Note: *You can create the same effect by building multiple revisions of an item with a different annotation on each revision (open DEMO00054 and press **[Shift]** + **[Page Down]** to view revisions). However, if you use this method and you have zoomed or rotated the original or a revision, you lose the zoom and rotation because the next or previous revision loads as a new object.*

Defining Layer 1

Layer 1 is the default layer for all annotations and markups. When you are in the Presentation Mode, layer 1 is the only layer you can add or remove markups from. You could spend a substantial amount of time preparing items with markups during the pre-treat process, only to have them deleted during the presentation. Using multiple layers ensures that the work done during pre-treat does not accidentally get removed during the presentation.

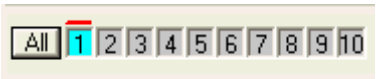
Note: *Create any markups that you want to be able to delete during the presentation in layer 1. Create any markups you do not want to be able to delete during the presentation in layer 2 or above.*

Creating a Moving Highlight

You may want to use multiple layers to create the effect of a highlight moving down the page of a document.

Follow these steps to create a moving highlight:

1. Select the document you want to add the highlight to
2. Click the Annotation Tools button. The annotation toolbar, layer indicator (shown below), color palette, and sizing tools are displayed.



Annotation Layer Indicator

3. Choose the Highlight tool. Currently, you are on layer 1. If you want to begin the display of the document without any paragraphs highlighted, leave layer 1 without any markups.
4. Click layer 2. Drag a rectangle box around the first paragraph you want to highlight.
5. Click layer 3. Notice there are no markups on this level. Drag a rectangle box around the second paragraph you want to highlight.
6. Click layer 4. Drag a rectangle box around the third paragraph you want to highlight. Continue changing layers and highlighting. Up to 10 layers can be used on one document.
7. Click All on the Annotation Toolbox to display all the highlighted paragraphs and check your work. If any of the highlights need to be resized or moved, use the Selection tool for editing.
8. Click Clr to turn off the ALL display.
9. When you are finished, you are ready to save the markups. You need to think about which markups you want to display when the item is opened in Presentation Mode. Whatever markups are visible at the time of save will display when the item opens. If you want to begin with a blank document, click layer 1 (which should have no markups) before saving. Then in Presentation Mode, use either the **Next Overlay (-NO) and Previous Overlay (-PO)** commands or the new Layer Indicator feature to move between the overlays.

Note: *You can skip a layer when defining the markups to give the illusion of a page with no markups.*

Viewing the Moving Highlight

To view an example of a moving highlight, follow these steps:

1. Go into Presentation Mode and open DEMO00054 into the default zone by typing DEMO00054 and pressing **[Enter]**.
2. Either press **[Ctrl]** + **[Page Down]**, **-NO** command, or use the new Layer Indicator (shown below) to view the next overlay.

Layer Status Indicator

3. As you move through each successive overlay, the highlight moves down the page. You can also use the Layer Status Indicator to display multiple layers at once or specify certain layers (i.e. layer #1 and #4). For more detailed information about the Layer Status Indicator, click the link at the bottom of this page.

Set a Global Watermark

More Information:

- Layer Status Indicator
- View Case Items

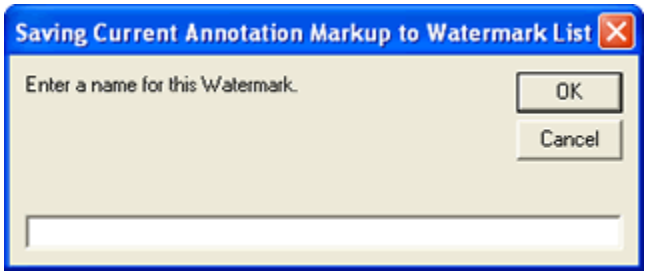
Watermarks

Topics:

- Create a Watermark
- Set Global Watermark

Create a Watermark

1. Open the Annotation Toolbar and annotate an image with the annotation that you want to use as a watermark.
2. When you have created the desired annotation, click the [**Save current image's markups as a global markup]** button from the toolbar.
3. Enter the Name for the Watermark in the resulting dialog box

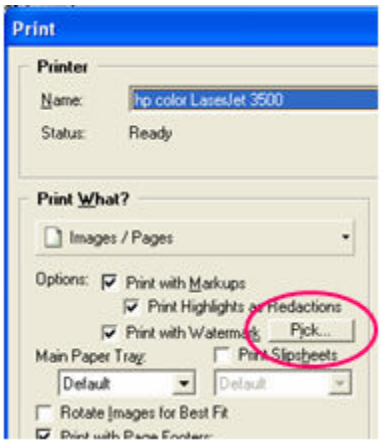


5. Click **[OK]. T**he watermark will be added to the list of available watermarks. Click **[Cancel]** to exit without saving.

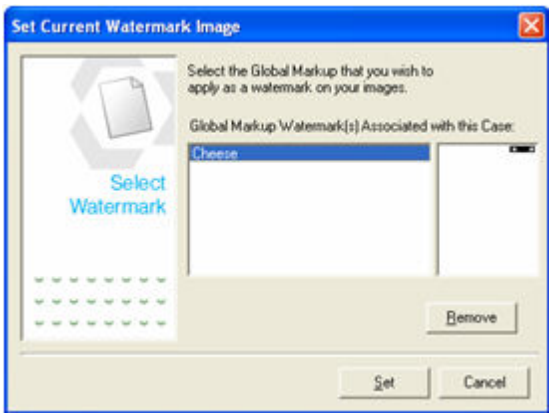
Set the Global Watermark

When printing or exporting images, you can choose to apply a global watermark to all printed or exported images.

1. To set the global watermark for printed or exported images, click the **[Pick]** button.



2. A selection screen appears. Click on the desired watermark.


Set Current Watermark Image
Select the Global Markup that you wish to apply as a watermark on your images.
Global Markup Watermark(s) Associated with this Case:
Cheese
Select Watermark
Remove
Set
Cancel

   A preview of the selected watermark will appear in the window next to the watermarks list.

3. Click **[Set]**.

   Note: *There will be no visible indication on the images in the Case Explorer that a watermark has been set.*

The printed or exported images will have the selected watermark applied.

More Information:

- View Case Items
- Annotations

Memos

Topics:

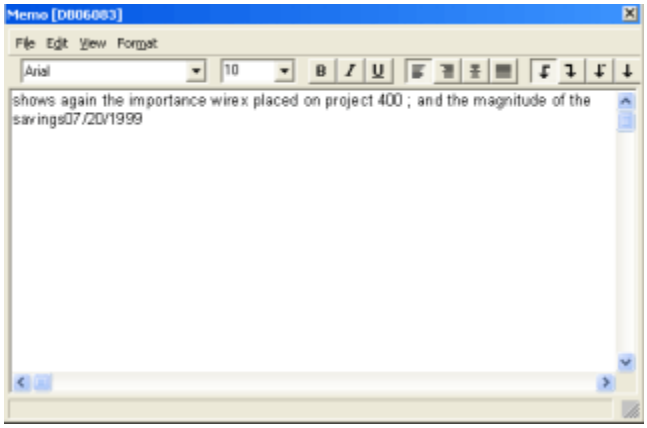
- Attach Memos
- Open Memos
- Delete Memos
- Load Memos from a Batch File
- Re-Index Memos

Document Manager allows you to attach a memo to any item except a DVT clip. The Search tool allows you to search for text in the memos. A small red or blue paperclip on the Item Type Icon and a yellow Memo Indicator in the status bar indicate that an item has a memo.

Attach Memos

To attach a memo

1. Select the desired image in the Case Explorer
2. Select **View Item Memo** from the Documents menu.


Memo [D006083]
File Edit View Format
Arial
10
shows again the importance wirex placed on project 400 ; and the magnitude of the savings07/20/1999

3. The Memo window is a text editor, allowing you to type in your memo.
4. After you have typed your memo, select **Save Changes** from the File menu within the Memo window.
5. Close the window by clicking the **[X]** in the upper-right corner or selecting **[Close]** from the File menu.

Open Memos

After a memo has been attached to an image, you can open the memo by:

1. Selecting **View Item Memo** from the Documents menu or by right-clicking the item and selecting **View Item Memo** from the shortcut menu.
2. The Memo window will appear, allowing you to view or edit the memo.
3. If the memo is edited, it must be saved again by selecting **Save Changes** from the File menu.

Delete Memos

To delete a memo:

1. Select the desired item in the Case Explorer and open the memo.
2. When the Memo window appears, choose **Remove Memo** from the File menu within the Memo window.
3. After the text has disappeared, click on the **[X]** in the upper-right corner of the Memo window or select **Close** from the File menu to close the Memo window.

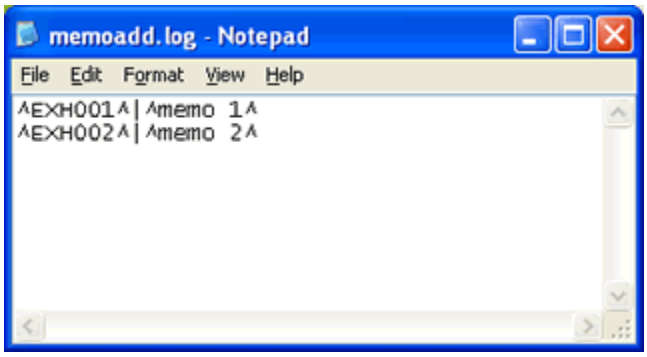
Load Memos from a Batch File

If you have a memo field in a third party database, you can transfer the memo information into TrialDirector memos by loading memos from a batch file.

To load the memos:

1. Select View Item Memo from the Document menu. When the Memo window appears, choose Load Memo Text From Batch file from the File menu in the Memo window.
2. In the resulting navigation window, locate and click on the memo batch file. Then double-click on the file name or click **[Open]** to begin loading the memos from the batch file.
3. If there are Item IDs in the memo batch file that Document Manager cannot find in the Case Explorer, a warning message will appear, asking you if you want to view a list of the memos that could not be added. Click **[Yes]** to view the list of memos that could not be added or **[No]** to return to the Case Explorer.

If you click **[Yes]**, the following file will open in the Notepad window:



The memoadd.log file keeps track of all the memos that could not be added to the case due to missing Item IDs. This file is saved in the TrialDirector folder (i.e., the folder where TrialDirector is installed, which is usually C:\Program Files\inData\TrialDirector). Any time Item IDs cannot be found during the memo loading process, TrialDirector will copy the associated lines from the batch file to the memoadd.log file.

4. Click on the **[X]** in the upper-right corner of the Notepad window to close the window.

The memos are now attached to the appropriate case items.

Note: *Memos cannot be attached to Digital Video Transcripts.*

Re-Index Memos

If for some reason the application was closed without shutting down properly, you may need to re-index the memos to refresh the database so that you can view the memos properly.

To re-index the memos:

1. Select **View Item Memo** from the Item menu.
2. When the Memo window appears, choose **Re Index All Memos** from the File menu in the Memo window.
3. When TrialDirector finishes refreshing the database, close the Memo window by clicking the **[X]** in the upper-right corner or choosing **Close** from the File menu.

More Information:

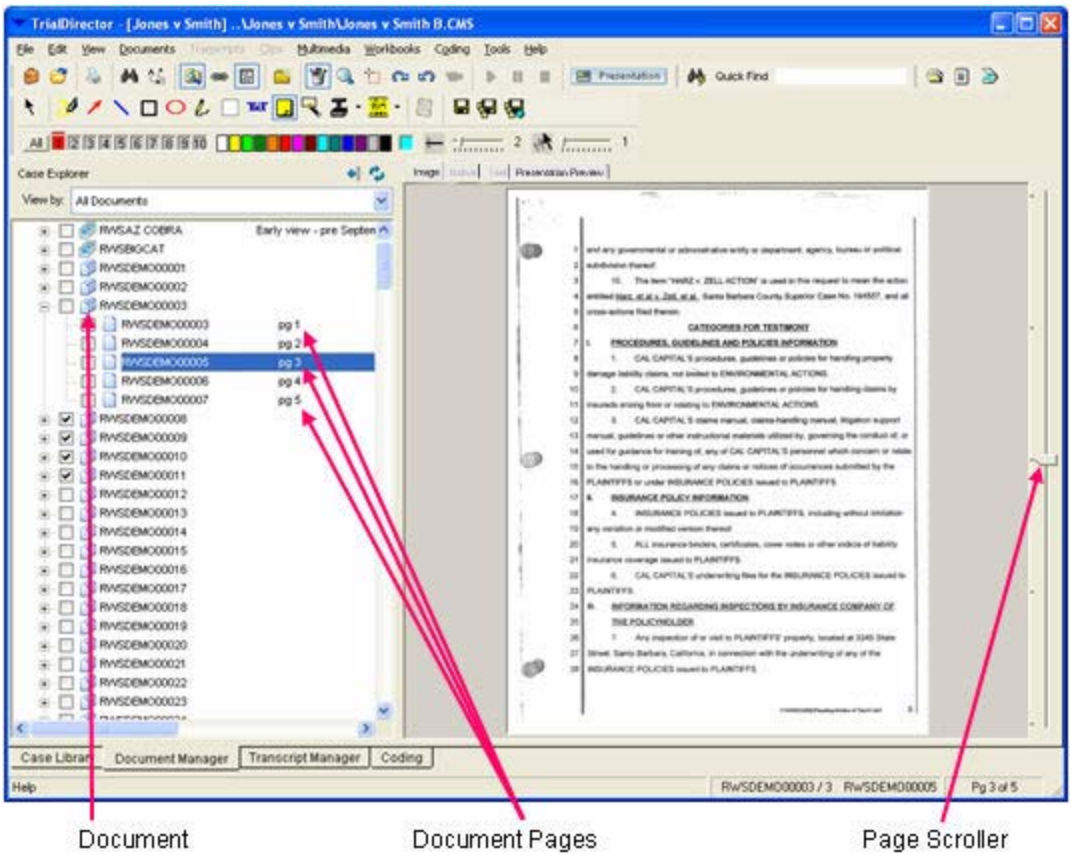
- Exhibit Management

Working with Images

Topics:

- Changing Pages
- Copy an Image Area to the Clipboard
- Create an Image Using the Quick Text Exhibit Creator
- Annotate Images
- Rotate Images
- Enlarge Images
- Pan Enlarged Images
- Restore the Images Original Size
- Magnify and Image Area in a Separate Window

Images are non-editable files, usually photos or scanned versions of hard copy documents. Images can be black and white or in color. You can use the Document Manager to organize and annotate images, including creating multiple versions of images with different annotations, or annotations in layers that can be used to show focus attention in a specific order.



Changing Pages

The Page scroller on the right side of the window allows you to move to a specific page within a document.

You can also change pages by clicking on the desired document page in the Case Explorer.

Copy an Image Area to the Clipboard

To copy an area of an image to the clipboard:

1. Select the Copy to Clipboard button on the toolbar.
2. Click and drag the cursor to draw a box around the desired area.
3. A window will appear confirming that the area has been copied to the clipboard.

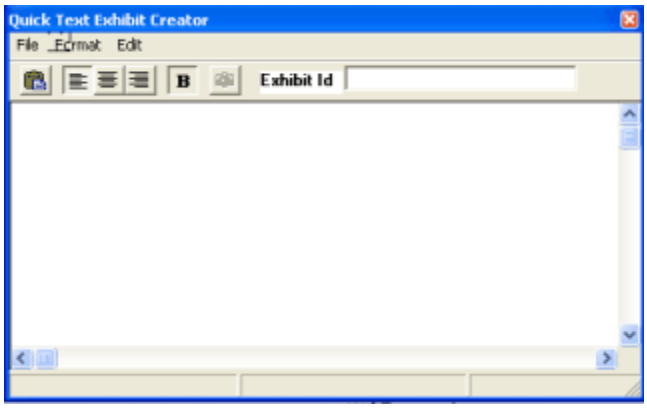
Create an Image Using the Quick Text Exhibit Creator

The Quick Text Exhibit Creator window allows you to convert ASCII text into an image file, which is then saved as a Photo document.

Note: *Text that contains ASCII page breaks or form feeds (ASCII characters with a value of 12) such as many transcript files, will automatically be created as a multi-page TIFF.*

To open the Quick Text Exhibit Creator

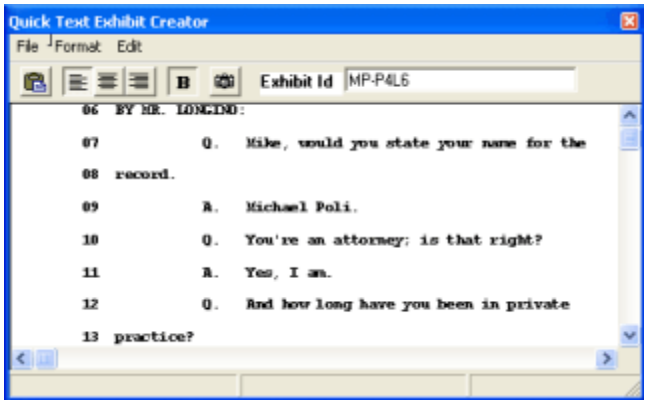
1. Select **Quick Text Exhibit Creator** from the Tools menu.



2. Enter an Item ID for the text image in the Exhibit ID box.
3. Insert text in the box provided by doing one of the following:

   - Enter text using the keyboard.
   - Paste text from the clipboard by clicking the **Paste Text From Clipboard** button on the Toolbar.
   - Drag and drop an ASCII or text file (*.txt) from the Microsoft Windows Explorer.

Note: *For best results, it is recommended that you limit each page to 50 lines of text with 80 characters per line. For large text files without embedded page breaks, you will need to manually break the text into manageable segments.*


Quick Text Exhibit Creator
File Format Edit
Exhibit Id MP-P4L6
06 BY MR. LONGINO:
07 Q. Mike, would you state your name for the
08 record.
09 A. Michael Poli.
10 Q. You're an attorney; is that right?
11 A. Yes, I am.
12 Q. And how long have you been in private
13 practice?

4. Format the text using the formatting Toolbar buttons, as desired.
5. Enter an Exhibit Id.
6. To create an image of the text, click the **Create Snapshot Exhibit** button on the window Toolbar.

The new image is saved and placed in the Document Manager Case Explorer.

Note: *This feature is particularly useful for creating image files from transcript text, which frequently includes embedded page breaks. (The page breaks will not be visible.) When creating images from transcript text, try to paste and save the entire text first, before manually segmenting the text.*

Annotate Images

Annotations (added text) and markups (added markings such as arrows, highlights, redactions, etc.) can be applied to an image using the Annotation Tools.

Rotate Images

To rotate an image 90 degrees clockwise, do one of the following:

- Click the **[Rotate the Current Image Clockwise]** button on the Toolbar.
- Select **Rotate Image Clockwise** from the Documents menu.

To rotate an image 90 degrees counter-clockwise, do one of the following:

- Click the **[Rotate the Current Image Counter Clockwise]** button on the Toolbar.
- Select **[Rotate Image Counter Clockwise]** from the Documents menu.

The new orientation will be saved automatically.

Enlarge Images

- Pan Enlarged Images
- Restore the Original Image Size
- Magnify an Image Area in a Separate Window

You can enlarge any image area using the rubber-band zoom. Simply click and drag a rectangle around the image area you want to enlarge. As soon as you release the mouse button, the selected area is enlarged. Double-click the image to return to the original view.

Pan Enlarged Images

The Pan feature allows you to move around an enlarged image while retaining the zoom. Right-click anywhere in the display area, hold down the mouse button, and move the mouse around to pan. The image moves with the mouse and stays wherever you release the mouse button. You can also use the arrow keys to pan around an image.

Restore the Original Image Size

Double-click anywhere in the display area to restore an enlarged item to its original size.

Magnify an Image Area in a Separate Window

The Area Magnifier tool allows you to select an area of an image (such as the Bates number) to be enlarged and displayed in a separate window. The magnifier window retains the same zoom for each image as you move from page to page.

1. To magnify an image area, do one of the following:

   - Click the **Create Magnifier Selected Image Area** button on the Toolbar
   - Select **Magnify selected Image area** from the Documents menu.

2. Click and drag a rectangle around the area you want to magnify.

   A magnifier window similar to the one shown below will appear.

Close the magnifier window by clicking the **[X]** in the upper-right corner of the window.

More Information:

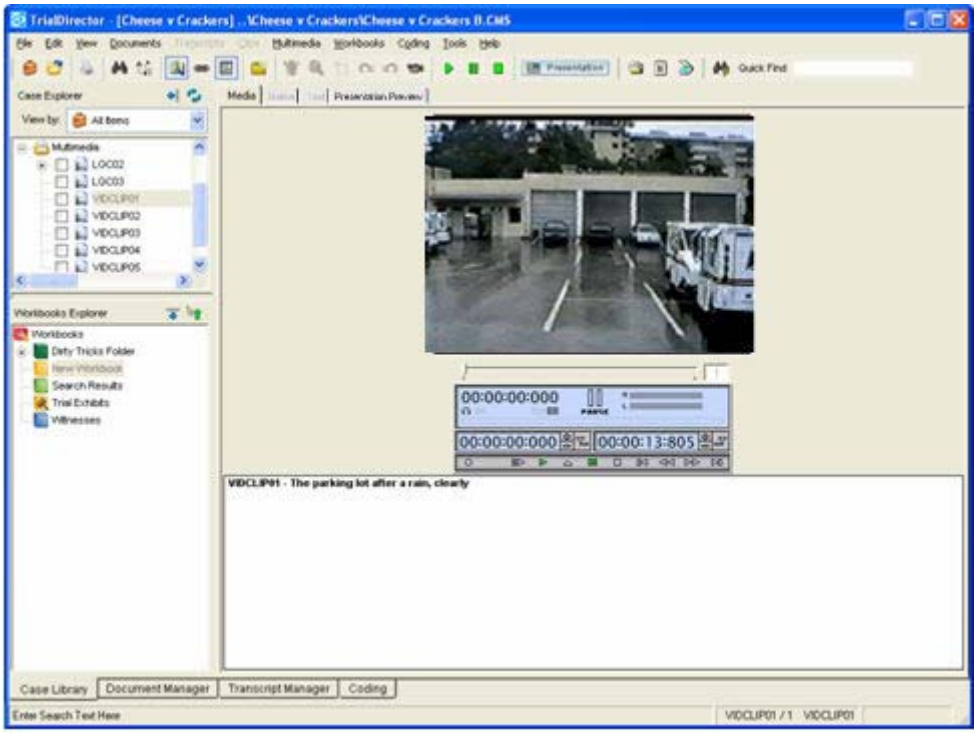
- View Case Items

Multimedia Files

Topics:

- The Multimedia Control Box
- Edit/Record Mode
- Play a Multimedia File
- Pause a Multimedia File
- Stop a Multimedia File
- Change the Playback Speed
- Seek in a Multimedia File
- Turn Audio On or Off
- Create a Clip
- Edit an Existing Clip

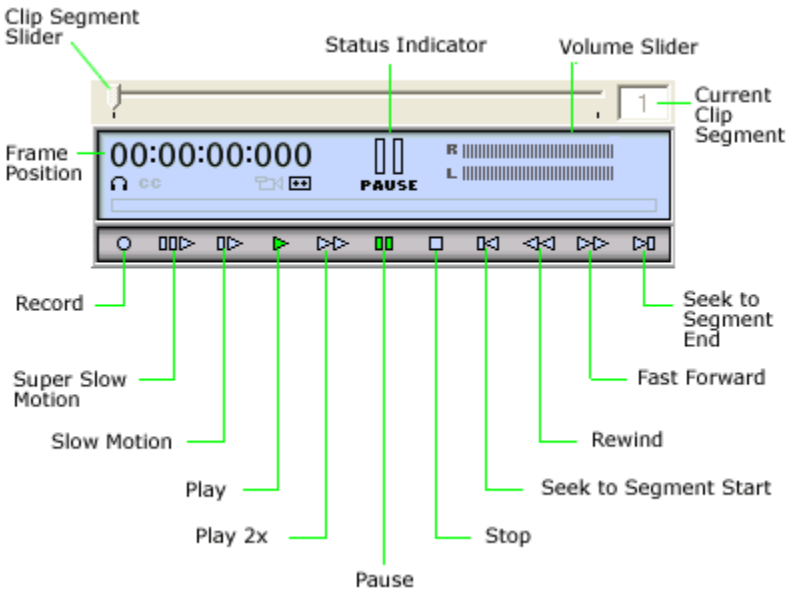
Multimedia files are audio and/or video streams, which are located on the Clips and Multimedia tabs. Multimedia streams on the Clips tab are associated with a DVT, but the synchronized transcript text is not displayed.



The Multimedia Control Box

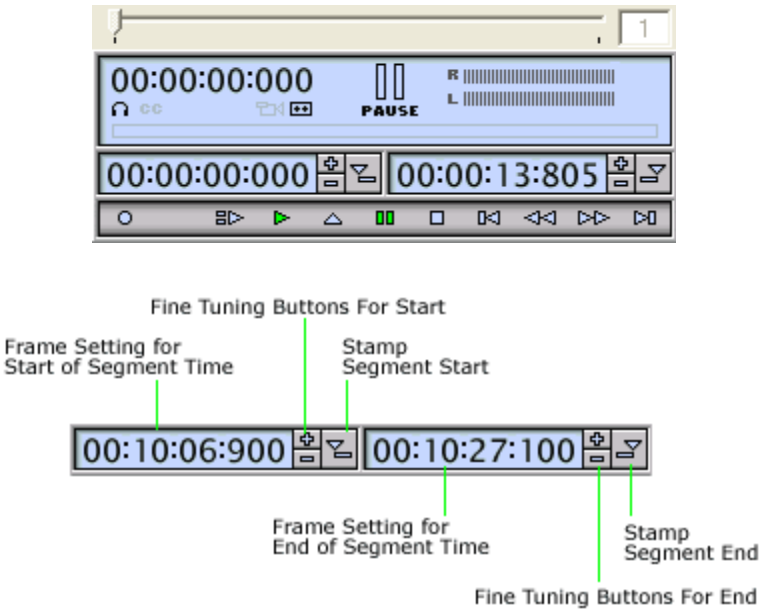
The Multimedia Control Box appears just below the video window and functions similarly to a standard VCR.

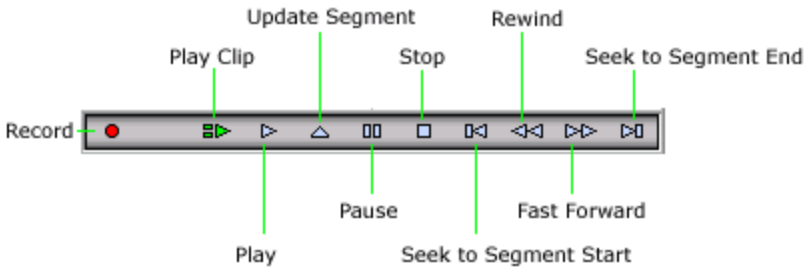
In View Mode, the Multimedia Control Box looks like the following:



Edit Record Mode

Click the **[Record]** button to enter Edit/Record Mode. In Edit/Record Mode, the Multimedia Control Box looks like the following:





Note: *See Appendix E for a detailed description of each multimedia control.*

Play a Multimedia File

To play a multimedia file, do one of the following:

- Click the **[Play]** button on the Multimedia Control Box.
- Click the **[Play]** button on the Toolbar.
- Select **Play** from the Multimedia menu.

Pause a Multimedia File

To pause a multimedia file, do one of the following:

- Click the **[Pause]** button on the Multimedia Control Box.
- Click the **[Pause]** button on the Toolbar.
- Select **Pause** from the Multimedia menu.

Stop a Multimedia File

To stop a multimedia file, do one of the following:

- Click the **[Stop]** button on the Multimedia Control Box.
- Click the **[Stop]** button on the Toolbar.
- Select **Stop** from the Multimedia menu.

Change Playback Speed

To change the multimedia playback speed, select one of the following from the **Playback Speed** from the Multimedia menu:

- **Super Slow Motion** to play the multimedia at less than slow motion speed.
- **Slow Motion** to play the multimedia slower than normal speed.
- **Normal** to play the multimedia at regular speed.
- **Double (2x)** to play the multimedia at twice normal speed.

The multimedia will continue playing at the selected speed until a different speed is selected.

Seek in a Multimedia File

The Seek commands allow you to seek to different parts of a multimedia file.

To seek to the beginning of a multimedia file, do one of the following:

- Click the **Seek To Beginning** button on the Multimedia Control Box.
- Select **Seek To | Beginning** from the Multimedia menu.

To seek to the end of a multimedia file, do one of the following:

- Click the **Seek To Ending** button on the Multimedia Control Box.
- Select **Seek To | Ending** from the Multimedia menu.

To seek to a random position in a multimedia file, select **Seek To | Random Position** from the Multimedia menu.

The multimedia file will seek to the appropriate position.

Turn Audio On or Off

To turn audio on or off, select **Audio Mute** from the Multimedia menu.

You will still be able to play the corresponding video.

Create a Clip

During the courtroom presentation, you may not want to present the entire length of a multimedia file. TrialDirector allows you to use Edit/Record Mode to create clips of any multimedia file that appears on the Multimedia Tab.

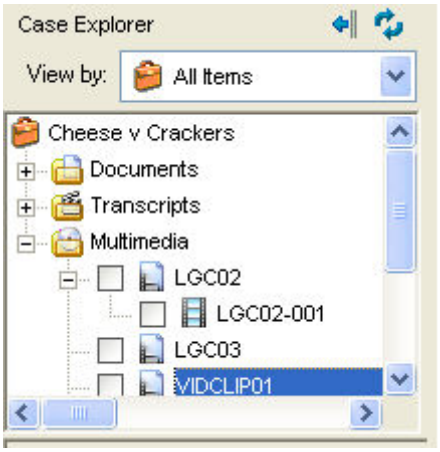
Note: *Since TrialDirector only allows one segment per clip, the terms 'clip' and 'segment' are used synonymously in the following sections.*

Follow these steps to create a multimedia clip:

1. Use the Case Explorer to select an existing multimedia file from the Multimedia folder.
2. Click the **[Record]** button to enter Edit/Record Mode.
3. Seek to the point in the multimedia file where you want to start a new clip. The frame position indicates the time elapsed since the beginning of the multimedia file.
4. Click the **[Stamp Segment Start]** button at the desired point. It does not matter if the multimedia file is playing or paused. The beginning clip position is set at the

current frame position. If you do not stamp the exact position desired, you can use the **[+] or [-]** buttons to adjust the start position forward or backward one frame at a time.

5. Seek to the point in the multimedia file where you want to end the clip.
6. Click the **[Stamp Segment End]** button at the desired point. The ending clip position is set at the current frame position. If you do not stamp the exact position, you can use the **[+] or [-]** buttons to adjust the end position forward or backward one frame at a time.
7. Save the clip by clicking the **[Update Segment]** button. This adds the clip to the Multimedia folder under the original item using the original multimedia file Item ID plus an additional three-digit extension, as shown in the figure below. The extensions for successive clips increment automatically. Barcodes can be created for multimedia clips, which can be used to recall the clips in TrialDirector.



8. Verify the accuracy of the new clip by selecting it from the Case Explorer and replaying it. If adjustment is needed, you will need to edit the clip.

Note: *You cannot create a clip from a clip. You can only create a clip from the original multimedia file.*

Edit an Existing Clip

The start and end positions of a clip may not be set at the exact positions desired. Follow these steps to adjust the beginning or ending positions of the clip:

1. Select the clip in the Case Explorer.
2. Click the **[Record]** button on the Multimedia Control Box to enter Edit/Record Mode.
3. Click the **[Play]** button to play the clip and determine what changes need to be made.
4. Click the **[+] or [-]** buttons next to the **[Stamp Segment Start]** button to adjust the beginning of the clip or click the **[+] or [-]** buttons next to the **[Stamp Segment End]** button to adjust the ending of the clip.

5. Save the clip by clicking the **[Update Segment]** button. This saves the new changes to the clip.

More Information:

- **Appendix E**

Native Files

A Native file is a file created in a program outside of TrialDirector that is preserved in its original format (such as a Word file with a .doc extension or an Excel file with an .xls extension). TrialDirector distinguishes native file documents from imaged documents (documents that have been converted from their original formats to image files, such as a .TIF files).

To view a file in its native format, click the **Native** tab. If the tab is unavailable (grayed out), native viewing is not supported for the file type, or the required application is not installed. See Appendix D - TrialDirector Supported File Formats for more information.

More Information:

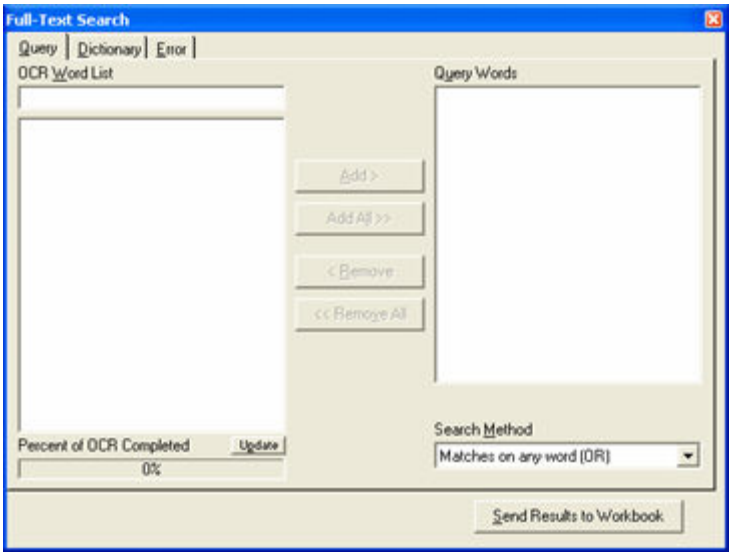
- Supported File Formats
- View Case Items
- Filter Case Explorer by File Type

Perform Full Text Queries

TrialDirector has a powerful Word Search tool that allows users to query one or more keywords from full-text OCR. The search results can be sent to a workbook. After the image result set is displayed, viewing the associated full-text OCR will highlight each key word from the query. This tool is useful for identifying key documents from among thousands of others.

To query full-text OCR, perform the steps below:

1. You should complete the entire OCR process on the current case using a third-party product. Completing the OCR processing on the case will ensure more complete results, since text for all images will be searchable.
2. From the Tools menu, select **Full Text,** then **Full Text Advanced Search** . The following dialog will appear:

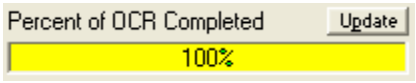


3. Even though there are words in the OCR Word List, the list is left empty upon load to save memory when large numbers of images have been processed.

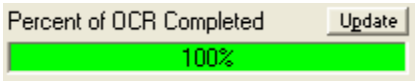
Note: *Type * in the OCR Word List text box to display the entire word list. This may take a few moments on large cases.*

4. Note the colored progress bar under the Percent of OCR Completed heading. This indicates how much of the current case has been OCR processed. Any percentage under 100% will display a red colored bar, indicating that some documents in the case have not been fully OCR'd. (Note that some documents, such as a handwritten page, may not be OCR processed, and would cause the percent of OCR completed to be less than 100%.) When running searches on lower percentage completed cases, the results do not represent the entire scope of documents. A fully OCR completed (100%) case will display a green colored bar, indicating search results will represent the entire scope of documents. Below are examples of uncompleted and completed progress bars.

Incomplete OCR

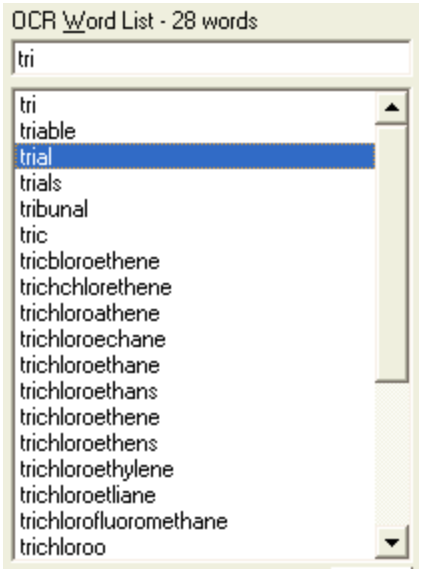


Complete OCR but with Errors - select Error tab for error details

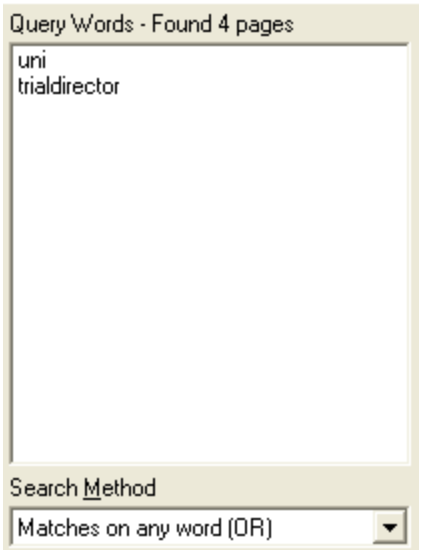


Complete OCR

5. To add a search term to the Query Words list, begin typing the word in the OCR Word List text box, as shown below. Trial Director will display a list of possible choices based on the letters that you type.



6. Select the desired word, then click **[Add]** to move the selected word to the *Query Words* list. Repeat the process until all words needed for the search have been added. Once all of the words have been added to the *Query Words* list, it will look similar to the example below.



7. Select the **Search Method** (as shown above) from the drop down list. Using AND parameters versus OR parameters will result in a more refined result.
8. Click the **Send Results to Workbook** button. A new workbook is created in the Workbooks Explorer, with the label **Full Text: <search words>**. The workbook will contain all of the associated images and their OCR text, with the search words highlighted in the OCR text.

Now that the items are in a workbook, they can be exported, printed, sent to exhibit outline, and organized. See the link at the bottom of this topic for more information about Workbooks.

9. The **Full Text Search** dialog remains open so that you can perform additional searches if desired.

More Information:

- Document Manager
- OCR Full Text
- Workbooks

Working With Full-Text OCR

Topics:

- Perform Full Text Queries
- View/Edit Full Text OCR
- Add Full Text to Coding Database
- Importing Full-Text OCR

One of the features of Document Manager is the ability to work with full-text OCR. When the Document Manager has access to full-text OCR from images contained in a Document Manager case, the features discussed in this section are available.

Document Manager has the ability to perform queries from the full-text OCR word lists. Also, the full text OCR can be viewed and edited from within Document Manager. Bridging the gap between OCR and Coding data, Document Manager users can even send selected OCR text directly to a coding field.

More Information:

- Document Manager

View/Edit Full Text OCR

Topics:

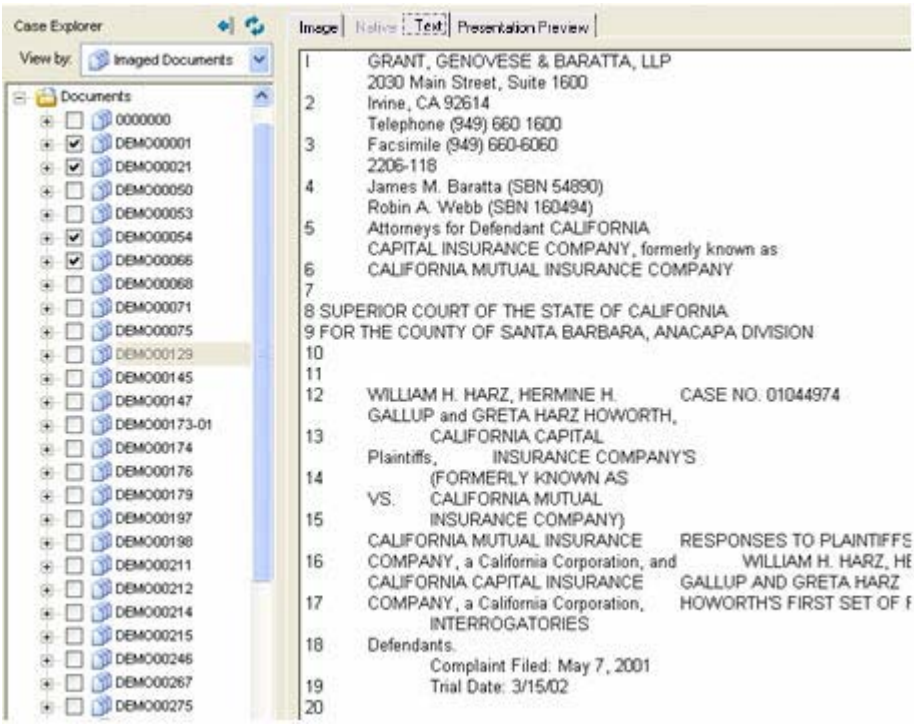
- Methods to view full text OCR
- Updating OCR text
- Navigating through full-text for multi-image documents

Methods To View Full Text OCR

Full Text OCR can be viewed easily, using several methods. Below are the ways to view Full-Text OCR:

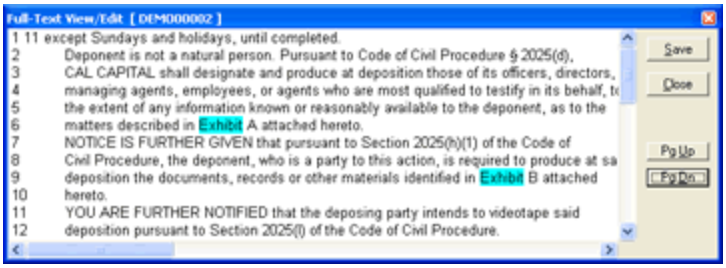
- Select an image in the Case Explorer, then click the Text tab above the Item Viewer
- Right click on the current Document Manager Case Explorer item and select **View / Edit Full Text of this Page**
- Select the **View / Edit Full Text of this Page** option from the Documents menu

Each of the methods listed above will open the Text tab of the Item Viewer, displaying the OCR text. You can click on the image tab to view the scanned original. Below is an example of the Full-Text View / Edit feature with OCR text.



The OCR text can be browsed and edited from this window. Also, the current Page ID is displayed in the status bar below the Item Viewer window.

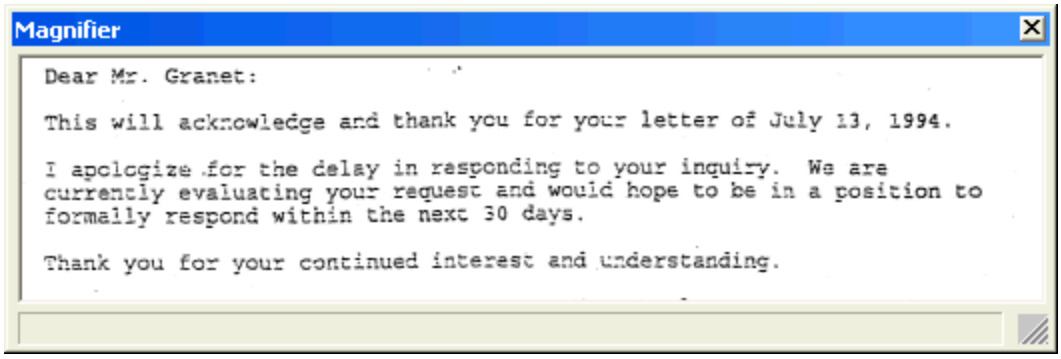
When viewing items from a Word List search, on the Query tab, the search words will appear highlighted, as shown below.


Full-Text View/Edit [DEMO00002]
1 11 except Sundays and holidays, until completed.
2 Deponent is not a natural person. Pursuant to Code of Civil Procedure § 2025(d),
3 CAL CAPITAL shall designate and produce at deposition those of its officers, directors,
4 managing agents, employees, or agents who are most qualified to testify in its behalf, t
5 the extent of any information known or reasonably available to the deponent, as to the
6 matters described in Exhibit A attached hereto.
7 NOTICE IS FURTHER GIVEN that pursuant to Section 2025(h)(1) of the Code of
8 Civil Procedure, the deponent, who is a party to this action, is required to produce at sa
9 deposition the documents, records or other materials identified in Exhibit B attached
10 hereto.
11 YOU ARE FURTHER NOTIFIED that the deposing party intends to videotape said
12 deposition pursuant to Section 2025(l) of the Code of Civil Procedure.
Save
Close
Pg Up
Pg Dn

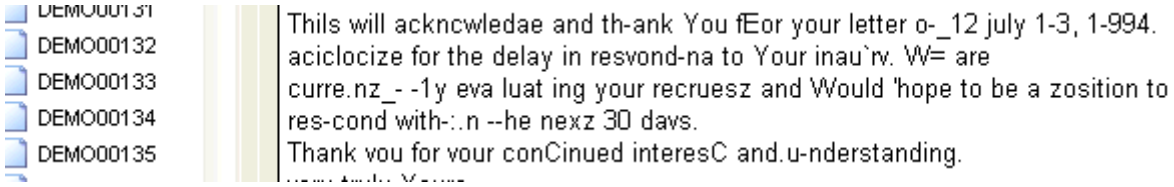
Updating OCR Text

Due to the poor quality of some original documents, not every full-text OCR word is represented correctly. Sometimes, these words may need spelling correction in order to facilitate word searches. Below is an example of an OCR record from a particularly bad original.

Original Image


Magnifier
Dear Mr. Granet:
This will acknowledge and thank you for your letter of July 13, 1994.
I apologize for the delay in responding to your inquiry. We are currently evaluating your request and would hope to be in a position to formally respond within the next 30 days.
Thank you for your continued interest and understanding.

OCR Result


DEMO00131
DEMO00132
DEMO00133
DEMO00134
DEMO00135
Thils will acknowledae and th-ank You fEor your letter o-_12 july 1-3, 1-994.
aciclocize for the delay in resvond-na to Your inau`rv. W= are
curre.nz_- -1y eva luat ing your recruesz and Would 'hope to be a zosition to
res-cond with-:.n --he nexz 30 davs.
Thank vou for vour conCinued interesC and.u-nderstanding.

This text can be edited and saved in the Item Viewer. You can either:

- Edit text directly in the Item Viewer
- Cut and paste the text into a word processing program and use the spell checker (Edited text can then be pasted back into the Item Viewer)

To cut and paste from the Item Viewer, select the desired text, then right-click to access the cut and paste functions. After the full-text item is re-indexed, the corrected words will be

available in the Word List. Using the Word List Search tool, the corrected words can now be successfully queried.

Navigating Through Full-Text for Multi-Image Documents

When reviewing full-text OCR for multi-image documents, Document Manager provides the ability to navigate through all related pages. Using the up and down arrow keys will move you through the full-text OCR for a multi-page document. You can also simply click on the image ID in the Case Explorer to move through the document.

More Information:

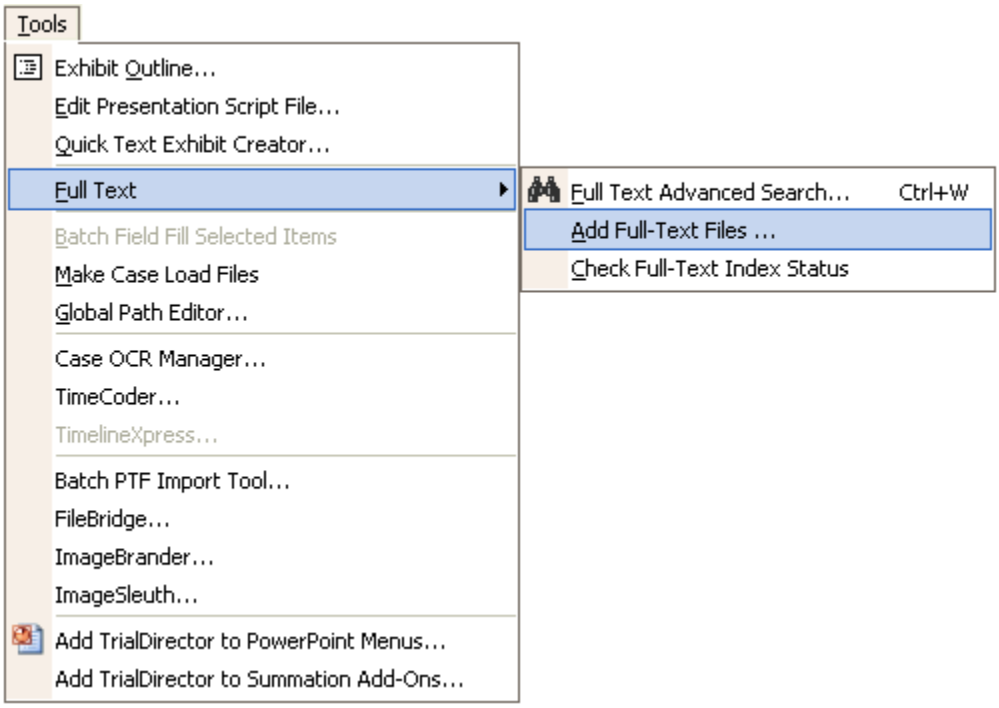
- Document Manager
- OCR Full Text

Importing OCR Text

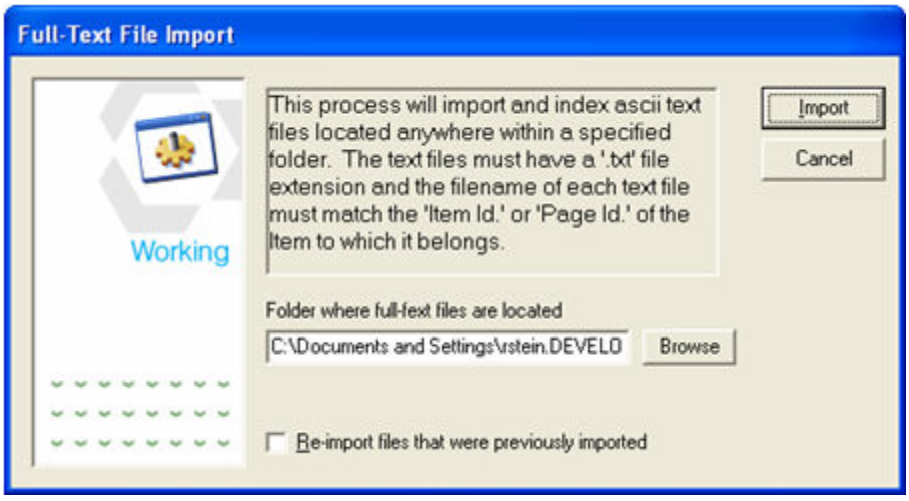
TrialDirector can import and index OCR files from third-party providers. The OCR text file must have the exact same name as its associated image file, except that the text file must have a .txt file extension. For example, if an image file is named 'spartacus01.tif', then its associated OCR file must be named 'spartacus01.txt'.

Add Full-Text Files

1. To add text files, select **Full Text** from the Tools menu, then select **Add Full-Text Files...**



2. The **Full-Text File Import** dialog opens. Click the **Browse** button to select the file location for your full-text files.


Full-Text File Import
Working
This process will import and index ascii text files located anywhere within a specified folder. The text files must have a '.txt' file extension and the filename of each text file must match the 'Item Id.' or 'Page Id.' of the Item to which it belongs.
Import
Cancel
Folder where full-text files are located
C:\Documents and Settings\rstein.DEVELO
Browse
Re-import files that were previously imported

3. TrialDirector will match the text file IDs with image file IDs that exist in Document Manager, and will import and index all matching files. (This may take a while if there is a large amount of text to index.)

   The imported text will function just like any other text in the Document Manager, and is fully searchable.

More Information:

- Document Manager
- OCR Full Text
- Workbooks

Search and Replace

The search and replace feature allows you to search a selected Case Explorer field for all occurrences of specified text and replace the text with alternative text. Follow these steps to find and replace text:

1. Select **Replace** from the Edit menu.

2. Type the text you want to find and replace in the **Find What:** field.
3. Type the replacement text in the **Replace With:** field or leave it blank, as desired.
4. Select the field to be searched by clicking on the arrow next to Select Field and selecting the desired field from the drop-down list.
5. Select the **Match Case** option if you want the search to be case sensitive.
6. Select the **Find Whole Word Only** option if you do not want the search to find any matches within a word (i.e., "exh" would not find "exhibit").
7. When the options are set as desired, click **[Replace]** to begin the process. When the process is complete, a small window will appear, indicating how many replacements were made.
8. Click **[OK]** to return to the Search & Replace window.
9. Click **[Save Changes]** to make the replacements permanent or **[Cancel]** to cancel without saving the changes.

More Information:

- Application Window
- Case Explorer

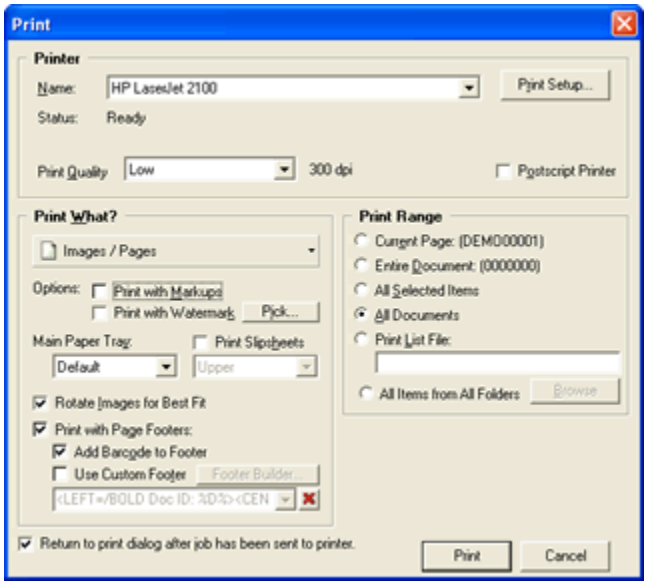
Print Items

Topics:

- Set Printer Properties
- Select Printer Output
- Select Print Range

Open the Print window by doing one of the following:

- Choose **Print** from the File menu.
- Click the **[Print]** button on the Toolbar.
- Select **Print Selected Item(s)** from the Items menu.
- Right-click on the record selector of any item and select **Print Selected Item(s)** from the drop-down menu.

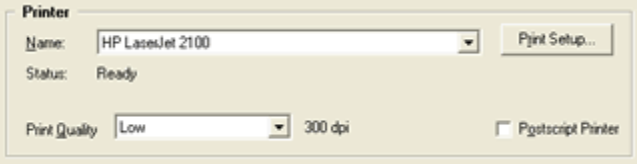


This window allows you to select a printer, print output, print range, and number of copies. The print options are described in the sections that follow.

Once all print options have been set, click **[Print]** to begin printing. If the required volume is not mounted, a message will appear, asking you to mount the appropriate volume. Mount the volume and click OK to continue printing.

Set Printer Properties

The Printer section of the Print window allows you to select a destination printer and set the printer and page properties.



To select a printer, click the arrow in the Name field and select the desired printer from the list. The current properties for the selected printer appear beneath the printer name.

- To change the page layout properties, click the **[Print Setup...]** button.
- To change the printer properties, click the **[Print Setup...]** button then the **[Properties]** button on the subsequent window.

Note: *For information on setting up printers, print properties or page layout, refer to your Microsoft Windows documentation.*

Select Printer Output

The **Print What?** section of the Print window allows you to select the desired printer output, as well set the options for the selected output.

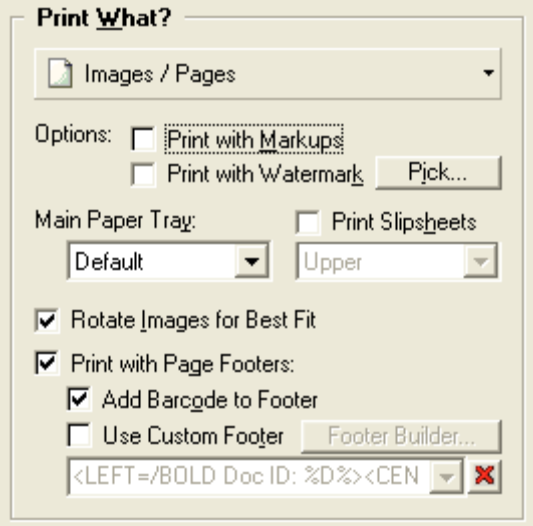
Topics:

- Images/Pages
- Images/Pages (Thumbnails)
- Images/Pages (List Report)
- Barcode Sheets

Images/Pages

Images/Pages can be printed for Document and Photo item types. This option prints one image per page.

To print images, select **Images / Pages** in the **Print What?** selection box.



Option	Description
Print with Markups	Prints the images with any markups (annotations) that may have been applied. ***Note**: The markup (annotation) layers that were visible when the item was saved will be the ones that are printed.*
Print with Watermark	Applies the designated global watermark to all printed images. The **[Pick]** button allows you to set the global watermark.
Main Paper Tray	Determines which printer tray contains the paper that the images will be printed on.
Print Slipsheets	Inserts a slipsheet before the first page of each document printed. The field directly below this checkbox determines which printer tray contains the paper that will be used as slipsheets. ***Note:*** TrialDirector will only print a slipsheet before items that are the first page of a document. If you have selected items from the middle of documents, the slipsheet feature may not be suitable

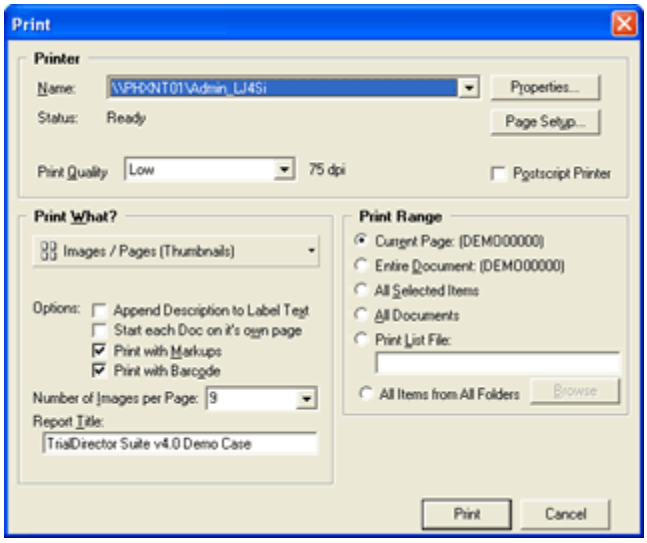
	for your printing job.
Print with Page Footers	Prints the images with either the default footer (Item ID, Document ID, and Page Number) or a custom footer, if one is selected
Add Barcode in Footer	Prints a barcode in the footer of the images when the **Print with Page Footers** option is selected.
Use Custom Footer	Prints the images with a customized footer when the **Print with Page Footers** option is selected (see Appendix C for an explanation of custom footer commands).

Images/Pages (Thumbnails)

Thumbnails can be printed for Document and Photo item types. This option prints 4, 9, 12, or 20 images per page. This option also allows you to print thumbnails in an Exhibit Outline.

To print thumbnail images:

1. Select **Images/Pages (Thumbnails)** in the Print What? selection box.



Option	Description
Append Description to Label Text	Prints the first few words of the description underneath the barcode next to the Item ID (as space permits).
Start each Doc on it's own page	Forces a page break in the thumbnail report before the first page of each document.
Print with	Prints the thumbnails with any markups (annotations)

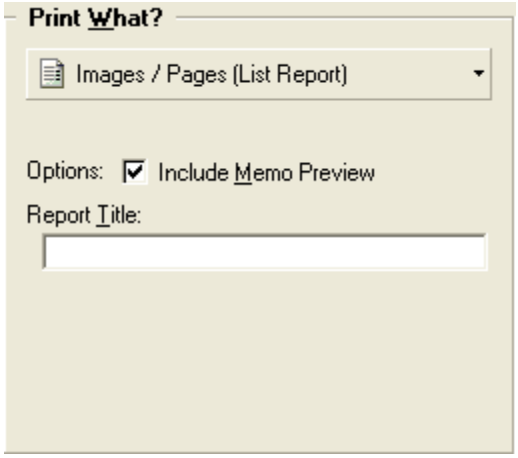
Markups	that may have been applied to the images.
Print with Barcode	Prints a barcode below each thumbnail.
Number of Images Per Page	Determines how many thumbnails to print on each page: 4, 9, 12 or 20. The outline option prints a report that includes the Item ID, description, memo, Exhibit Number, Trial Exhibit Number, thumbnail, and barcode.
Report Title	Allows you to enter a report title, which will be printed in the upper-right corner.

Images/Pages (List Report)

List reports can be created for any item type, and can be used to organize exhibits in a trial notebook.

To print an exhibit report

1. Select **Images/Pages (List Report)** in the Print What? selection box.



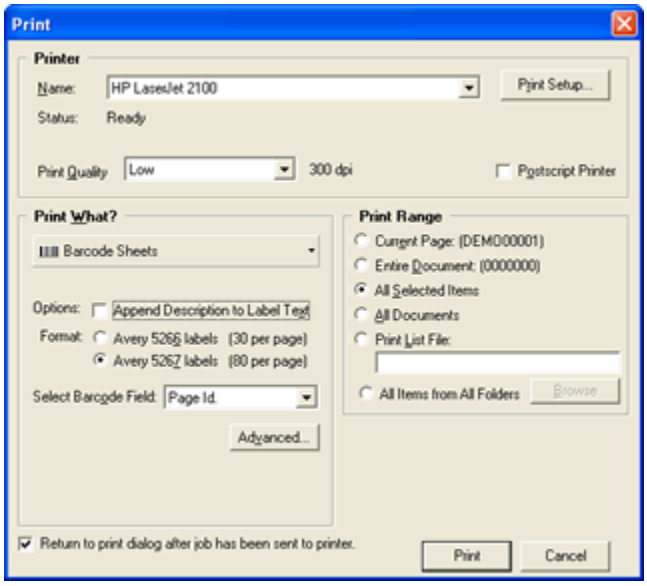
Option	Description
Include Memo Preview	Prints the first few words of the memo in the notes area of the report (as space permits).
Report Title	Allows you to enter a report title, which will be printed in the upper-right corner.

Barcode Sheets

Barcode sheets can be printed for any item type and can be used to load items in the TrialDirector presentation module by scanning them with a barcode gun.

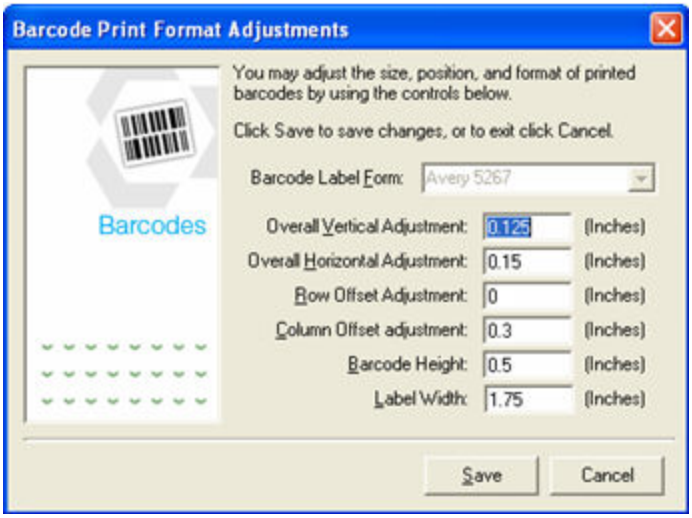
To print barcodes:

1. Select **Barcode Sheets** in the **Print What?** selection box.



Option	Description
Append Description to Label Text	Prints the first few words of the description underneath the barcode next to the Item ID (as space permits).
Format	Allows you to select which label form you are using. There are two label size choices available. If you do not plan to apply the barcodes to the original exhibits, you can print the barcodes on a plain sheet of paper and use it to recall exhibits during trial.
Select Barcode	Field Determines whether the barcodes will be based on the Page ID (Item ID), Exhibit Number, or Trial Exhibit Number.

2. To adjust the barcode positioning on the label sheet, click the **[Advanced]** button.



Option	Description
Barcode Label Form	Displays the label for you selected in the Format field on the Print window.
Overall Vertical Adjustment	Shifts all the barcodes on the page up or down, relative to the top edge of the printable area.
Overall Horizontal Adjustment	Shifts all the barcodes on the page to the left or right, relative to the left edge of the printable area.
Row Offset Adjustment	Adjusts the space allowance between the rows of barcodes.
Column Offset Adjustment	Adjusts the space allowance between the columns of barcodes.
Barcode Height	Determines the height of each barcode on the page.
Label Width	Determines the width of the barcode. Not all barcode readers can read extremely thin barcodes.

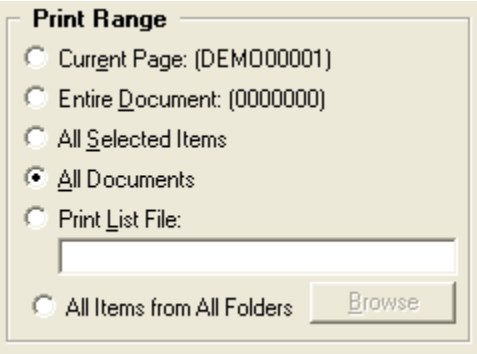
All measurements are in inches. The first two fields may contain negative numbers if you want to exceed the edges of the printable area.

Note: *If your barcodes are unreadable by your barcode reader, change the Label Width to a larger value (like 2). This spaces the bars in the barcode farther apart on high resolution printers. Your barcodes may also be unreadable if the Item IDs are not between 5 and 12 characters.*

3. When the settings are as desired, click **[Save]** to save your changes or click **[Cancel]** to abandon the changes and return to the Print window.

Select Print Range

The Print Range section of the Print window allows you to select the range of items you would like to print, based on your current selections.



Option	Description
Current Page	This option prints the item that is currently selected in the Case Explorer.
Current Document	This option prints the document that is currently active in the Case Explorer.
All Selected Items	This option prints all items currently selected in the Case Explorer (see Select Items).
All Documents	This option prints all items on the selected tab (documents, photos, or folder contents). ***Note:*** *The Print window will offer the option to print* ***All Documents****,* ***All Photos****, or* ***Folder [folder name]****, depending on which item type tab is currently active.*
Print List File	This option prints all documents or page ranges listed in a previously generated print list file (see the sample Print List File in Appendix A). Click the **[Browse]** button next to this option to select the list file from which you would like to print.

More Information:

- Exhibit Management

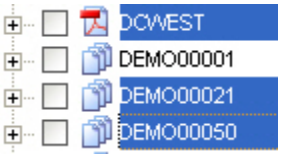
Exporting Selected Items to Adobe PDF

You can use Document Manager to export documents directly to Adobe PDF.

Note: Before you use this feature, keep the following in mind:

- *A* printer driver must be installed on your computer. If you do not have a physical printer to connect to, install any of the printer drivers built in with Windows (Control Panel > Printers and Faxes), or install a virtual PDF printer application (such as CutePD™).
- Creating a PDF file from selected pages of different documents will result in creation of a single PDF file. This feature is *not* designed to create new PDF files at document boundaries.
- Order of the items in the new PDF file is determined by ID, *not* by the order in which you select the items. For example, if you select TREX005, TREX003, and TREX009, they will be listed in the following order in the PDF: TREX003, TREX005, TREX009.
- If you select a Microsoft PowerPoint, Excel, or Word native document to include, a print placeholder will appear in its place within the PDF file.

1. Hold down the **CTRL** key and click the ID (*not* the check box) for each item you want to include in the PDF document as shown in this example:



2. Right-click to open the menu and select **Make PDF file from Selected Items**.
3. In the dialog box that opens, either enter a file path and name, or click **Browse** to navigate to a location and specify a file name.
4. To include any annotations (markups) that you have added and saved to items in the workbook, select **Apply All Markups Permanently to Exported Images**.
5. If you selected the previous option, you can also select **Convert all Highlight markups to redactions** if needed. The images in the PDF file will include the "Redacted" box wherever you used the Highlighter tool on the original images.
6. When the confirmation box appears indicating the file name and location, click **OK**.

More Information:

- Exporting a Workbook to Adobe PDF
- Printing from the Document Manager

- Selected Case Items (Tagging)

Exporting a Workbook to Adobe PDF

You can export the contents of a workbook to a single PDF file using the Make PDF file from Selected Workbook feature.

Note: Before you use this feature, keep the following in mind:

- *A* printer driver must be installed on your computer. If you do not have a physical printer to connect to, install any of the printer drivers built in with Windows (Control Panel > Printers and Faxes), or install a virtual PDF printer application (such as CutePD™).
- If the workbook contains a Microsoft PowerPoint, Excel, or Word native document, a print placeholder will appear in its place within the PDF file.
- If the workbook contains video transcript clips, they will not be included in the PDF.

1. In the Case Library, select a workbook in the Workbook Explorer area.
2. Right-click on the workbook itself (not one of the items within it) and select **Make PDF file from Selected Workbook**.
3. In the dialog box that opens, either enter a file path and name, or click **Browse** to navigate to a location and specify a file name.
4. To include any annotations (markups) that you have added and saved to items in the workbook, select **Apply All Markups Permanently to Exported Images**.
5. If you selected the previous option, you can also select **Convert all Highlight markups to redactions** if needed. The images in the PDF file will include the "Redacted" box wherever you used the Highlighter tool on the original images.
6. Click **OK** to begin the export process.

   The PDF export process may take a while, depending on the number of pages being processed.
7. When the confirmation box appears indicating the file name and location, click **OK**.

More Information:

- Exporting Selected Items to Adobe PDF
- Printing from the Document Manager

Remove Items from a Case

1. To remove items from a case, click on the item(s) to select them.
2. Select **Remove Selected Item(s)** from the Documents menu.

   A warning message will appear, requesting that you confirm the removal.

3. Click **[Yes]** to remove the item(s) from the case or **[No]** to cancel the removal.

Note: *Removing items from a case will not delete the source files from your computer.*

More Information:

- Exhibit Management
- Manage Cases

Toolbar

The Document Manager toolbar allows quick access to many menu functions. The Toolbar includes subsections:

- The Standard Toolbar
- Add Items Toolbar
- Quick Find toolbar

Certain portions of the Document Manager toolbar may be unavailable (the icons appear dimmed), depending on the type of document you are viewing. For example, the multimedia related buttons are unavailable when a scanned image is displayed.

Standard Toolbar

Find Next

Show or Hide Case Explorer

Connect / Disconnect Item Viewer

Show or Hide Item Viewer

Create New Workbook

Open Image Annotation Tools

Magnifier Tool

Copy Image Selection to Clipboard

Rotate Image Clockwise

Rotate Image Counter Clockwise

Capture Video Frame

Play Media

Pause Media Playback

Stop Media Playback

Launch Presentation Mode

Add Items Toolbar

Import New Item(s) From Manual Selections Dialog

Import New Item(s) From Batch Import File

Import New Item(s) From Capture Device (Twain Scanner)

Quick Find Toolbar

Find Text Now

More Information:

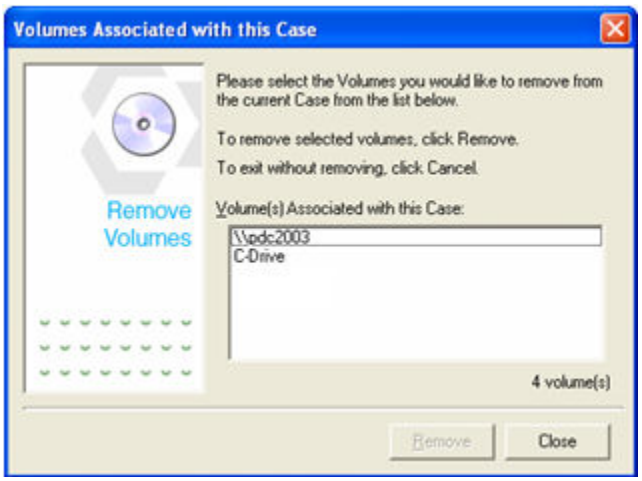
- Application Window

Volumes

Items are automatically associated with a specific volume when they are added to a case. The volume can be a hard drive (local or network), disk or CD/DVD where item source files are located and is identified by a Volume ID.

To remove all items associated with a volume:

1. Select **Remove Volume(s)** from the Documents menu.


Volumes Associated with this Case
Please select the Volumes you would like to remove from the current Case from the list below.
To remove selected volumes, click Remove.
To exit without removing, click Cancel.
Remove Volumes
Volume(s) Associated with this Case:
\\pdc2003
C-Drive
4 volume(s)
Remove
Close

2. On the displayed list, highlight the volume(s) you want to remove.
3. Click **[Remove]**.

The volume and all items associated with it are removed from the case.

Note: *If you remove a volume from the case, you will no longer be able to access any of the items that were in the volume without reloading them. The volume and items are not removed from the computer; only their association with the case is removed.*

More Information:

- Exhibit Management

Using Adobe SVG Viewer

TrialDirector has the ability to view Adobe SVG images in both Document Manager and the Presentation mode. After the SVG file has been created in Adobe Illustrator, it can be added to the TrialDirector case. Simply drag and drop the file into the Document Manager Case Explorer to add the SVG file.

Note: *Make sure that the Adobe SVG Viewer is installed on your computer and any computer that will be used to present the case. In order to display an SVG file, the viewer must be installed. The SVG Viewer installation file, SVGVIEW.EXE, is located in the \Support\Viewers directory on the TrialDirector Suite CD. The SVG Viewer can also be downloaded from http://www.adobe.com/svg/viewer/install/main.html*

Below are the methods used for navigating an Adobe SVG Image within TrialDirector.

Panning

Hold the alt key and click-and-drag with the mouse to pan an SVG image. When the scroll lock is enabled and Adobe SVG Viewer has the focus, the arrow keys may be used to pan the image.

Zooming

Hold the **[Ctrl]** key and click to zoom in at the mouse pointer location. Hold the **[Ctrl]** key and click-and-drag to select a region to zoom into. Hold the **[Ctrl] + [Shift]** keys and click to zoom out. You can also use the zoom commands in the context menu.

More Information:

- View Case Items
- Support File Types

Assign Exhibit Numbers or Trial Exhibit Numbers

TrialDirector enables you to enter Exhibit Numbers (typically your own numbering method as you organize your case) and the actual Trial Exhibit Numbers. You can assign an Exhibit

Number or Trial Exhibit Number for a specific item, or you can select multiple items and have numbers assigned in sequence automatically.

To assign an Exhibit or Trial Exhibit Number to an item:

1. From Case Explorer or Document Manager, right-click on the item and click **Properties.**
   The Item Properties dialog box appears.
2. Type the number in the **Exhibit #** or **Trial Exhibit #** box.
3. Click **Save**, or click **Next** to go to the properties for the next item.

To assign Exhibit or Trial Exhibit Numbers to multiple items:

1. From Case Explorer or Document Manager, press and hold CTRL while you select all of the items, making sure to select them *in the order* you want numbers to be assigned. Then, right-click and select **Assign Trial Exhibit Numbers to Selected Items** or **Assign Exhibit Numbers to Selected Items**.
2. In the dialog box, type the starting number.

   Caution: Any existing Exhibit or Trial Exhibit Numbers will be overwritten, and the numbers will be assigned in sequence regardless of whether a number is in use for another item in your case. Be sure to specify a unique starting number.

3. If each page of a document should have its own Exhibit or Trial Exhibit Number, select **Fill this field on every Page of the selected documents**. If you want to assign numbers at the document level only, ensure this option is not selected.
4. Click **OK**.
   TrialDirector assigns the numbers to each item, incrementing by one for each successive item or page.

More Information:

- Case Explorer
- Adding Items to Your Case

Transcript Manager

The Transcript Manager

The Transcript Manager unites deposition audio and video with smooth scrolling transcripts to captivate the jury in a way that is virtually impossible with a printed transcript. inMotion® synchronized Digital Video Transcripts (DVT), available from many litigation support firms nationwide, can be created from common VHS tapes and standard ASCII transcripts, making the advantages of using Transcript Manager immediately apparent.

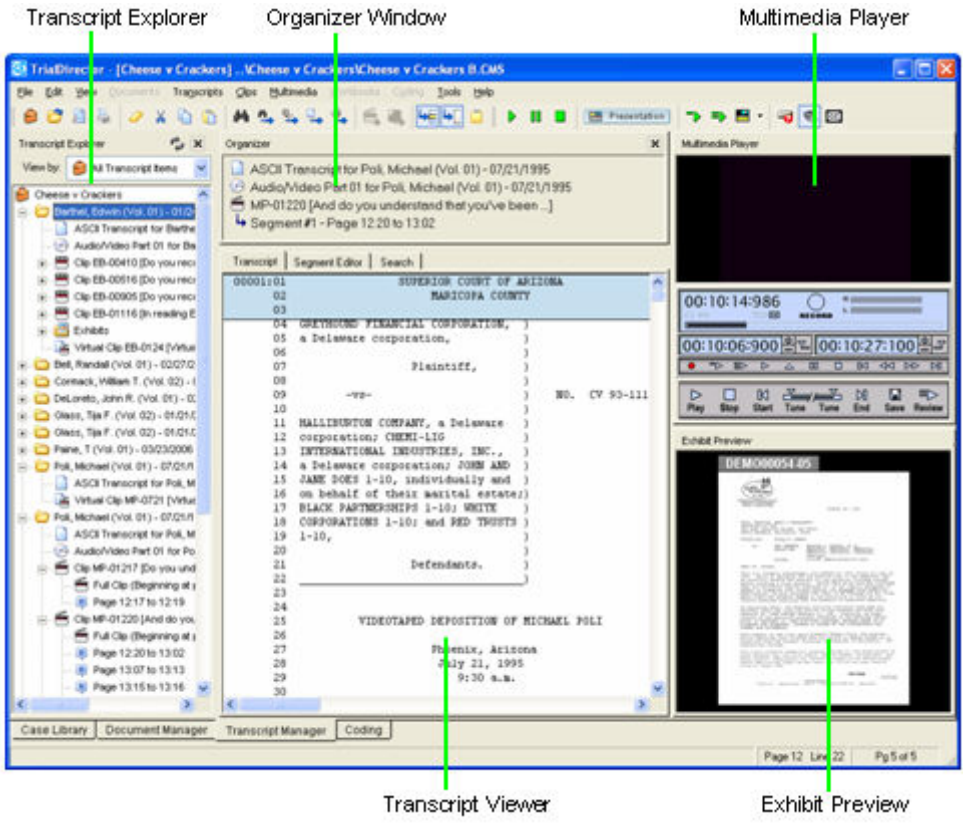
With the Transcript Manager clip wizard, clip creation is simply a matter of searching the transcript with one of the many search tools and highlighting the text selections to be included in the clip. That's it. Transcript Manager takes you from transcript search to a dynamic TrialDirector presentation in as little as six clicks. In fact, the clips will automatically appear on the DVT tab in Transcript Manager. And with the exhibit attachment feature, an integrated testimony presentation is as easy as the scan of a barcode.

Transcript Manager's capabilities extend beyond depositions. Any audio or video tape that has a corresponding transcription, such as court proceedings or phone conversations, can be converted into a Digital Video Transcript and used with Transcript Manager. With the wide range of possibilities, evidentiary review has entered the computer age.

The Transcript Manager Tab includes the:

- Toolbar
- Transcript Explorer
- Organizer Window
- Transcript Window
- Multimedia Player
- Exhibit Preview

The Transcript Manager *View* menu allows the user to hide certain components of the main application window. For example, the Case Explorer, Organizer, and Word Index areas can be hidden in order to use the entire space for the Transcript Window.



Component	Description
Transcript Explorer	The Transcript Explorer displays the Digital Video Transcripts (DVT's), multimedia files, transcript files, clips, segments and exhibits associated with the open case.
Organizer Window	The Organizer Window displays the status of the current session. If a Digital Video Transcript (DVT) is open, it will indicate which transcript, multimedia file, clip and segment are active. This is most important when creating or editing clips and segments.
Transcript Viewer	The Transcript Viewer displays the ASCII transcript when a Digital Video Transcript (DVT) is open. The viewer has three tabs at the top. • The Transcript tab displays the entire transcript text. • The Segment Editor tab displays the transcript text associated with the current clip, with the Segment Viewer displayed above the Transcript Window. • The Search tab allows you to search across multiple

	transcripts and conduct more advanced searches.
Multimedia Player	The Multimedia Player allows you to view and control the multimedia that corresponds to the selected transcript.
Exhibit Preview	Displays images of exhibits that have been synchronized with a transcript.

More Information:

- Presentation Mode
- Multimedia Player

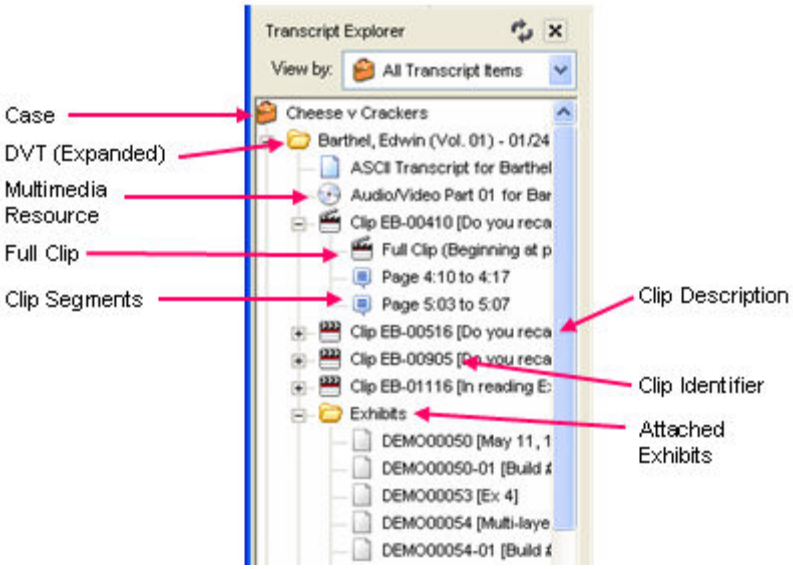
Transcript Explorer

Topics:

- Synchronize the Contents
- Show and Hide the Case Explorer

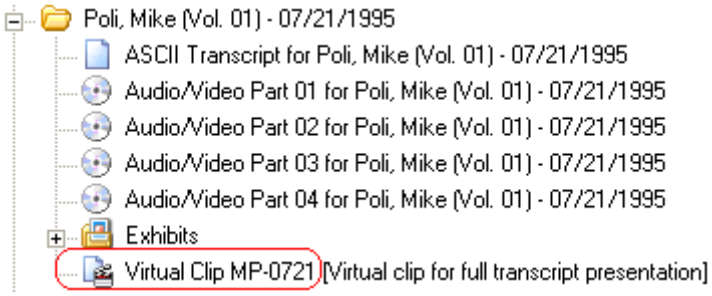
The Transcript Explorer displays files in a familiar tree structure, as shown in the figure below, and allows you to organize the Digital Video Transcript (DVT), clips and exhibits in a case.

Within Transcript Manager, the hierarchy is as follows: a Case (e.g. Smith v. Jones), then DVT's for each of the depositions represented by folders (e.g. B. Smith, A. Jones and C. Hunt), followed by clips (a clip is an shortened piece of the DVT), and finally, segments (a segment is a smaller piece of a DVT - several segments are often compiled as a single clip). A clip will always have at least one segment. If there are multiple segments within a clip, when the clip is played, it will go through each segment as listed without pausing between them.



Each case can have multiple Digital Video Transcripts. Each Digital Video Transcript appears as a separate folder within the case and can consist of an ASCII transcript, one or more multimedia resources, one or more clips, and attached exhibits.

In the Transcript Explorer, the virtual clip for any DVT is displayed in the DVT folder. The virtual clip is circled in the graphic displayed below. The Virtual Clip provides a convenient means of opening the entire DVT from the Presentation mode.


Poli, Mike (Vol. 01) - 07/21/1995
ASCII Transcript for Poli, Mike (Vol. 01) - 07/21/1995
Audio/Video Part 01 for Poli, Mike (Vol. 01) - 07/21/1995
Audio/Video Part 02 for Poli, Mike (Vol. 01) - 07/21/1995
Audio/Video Part 03 for Poli, Mike (Vol. 01) - 07/21/1995
Audio/Video Part 04 for Poli, Mike (Vol. 01) - 07/21/1995
Exhibits
Virtual Clip MP-0721 [Virtual clip for full transcript presentation]

Each clip appears as a separate folder within the Digital Video Transcript and can consist of one or more segments, which can be viewed separately or successively. All attached exhibits are contained in a folder within the Digital Video Transcript.

The contents of each folder within the case can be seen by clicking the plus sign (+) or double-clicking the icon to expand the folders.

Synchronize the Contents

When you have several DVTs, clips and segments in your case, you can easily identify the item you are working with in the Transcript Explorer by synchronizing the contents. When you synchronize the contents, the Transcript Explorer will highlight the active item being

displayed in the active Transcript Manager viewer (e.g., the Transcript Explorer will highlight the item shown in the Organizer Window, if the Organizer window is the active element).

For example, if you have a multiple versions of the same clip available and aren't certain which one you currently have open, synchronizing the contents will highlight the open segment in the Transcript Explorer.

To synchronize the contents, click the **Synchronize Contents** button on the Toolbar or select **Synchronize Contents** from the View menu.

Show and Hide the Case Explorer

The Case Explorer is displayed along the left side of the application window when the Transcript Manager tab is active.

To show the Case Explorer:

- Select **Case Explorer** from the View menu

To hide the Case Explorer:

- Select View menu and deselect **Case Explorer**.
- Click the "X" box in the upper right corner of Transcript Explorer

---

More Information:

- Transcript Manager
- Toolbar
- Case Explorer
- Organizer Window
- Transcript Window and Word Index.

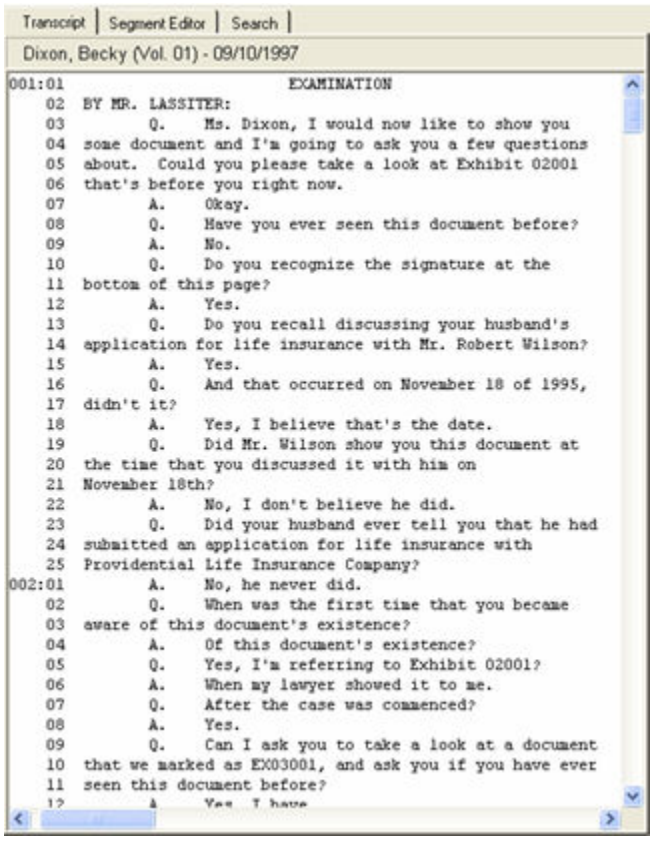
The Transcript Window

The Transcript Window manages the transcript text of the open DVT and consists of three tabs and a word index:

- Transcript Tab
- Search Tab
- Segment Tab
- Word Index

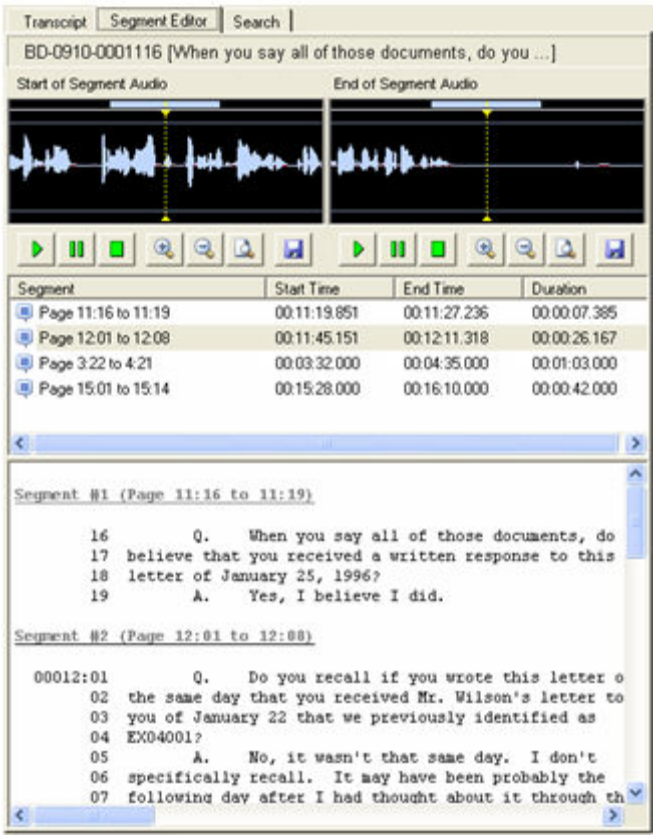
Transcript Tab

The Transcript tab displays the entire transcript associated with the open DVT, as shown in the figure below.


Transcript
Segment Editor
Search
Dixon, Becky (Vol. 01) - 09/10/1997
001:01 EXAMINATION
02 BY MR. LASSITER:
03 Q. Ms. Dixon, I would now like to show you
04 some document and I'm going to ask you a few questions
05 about. Could you please take a look at Exhibit 02001
06 that's before you right now.
07 A. Okay.
08 Q. Have you ever seen this document before?
09 A. No.
10 Q. Do you recognize the signature at the
11 bottom of this page?
12 A. Yes.
13 Q. Do you recall discussing your husband's
14 application for life insurance with Mr. Robert Wilson?
15 A. Yes.
16 Q. And that occurred on November 18 of 1995,
17 didn't it?
18 A. Yes, I believe that's the date.
19 Q. Did Mr. Wilson show you this document at
20 the time that you discussed it with him on
21 November 18th?
22 A. No, I don't believe he did.
23 Q. Did your husband ever tell you that he had
24 submitted an application for life insurance with
25 Providential Life Insurance Company?
002:01 A. No, he never did.
02 Q. When was the first time that you became
03 aware of this document's existence?
04 A. Of this document's existence?
05 Q. Yes, I'm referring to Exhibit 02001?
06 A. When my lawyer showed it to me.
07 Q. After the case was commenced?
08 A. Yes.
09 Q. Can I ask you to take a look at a document
10 that we marked as EX03001, and ask you if you have ever
11 seen this document before?

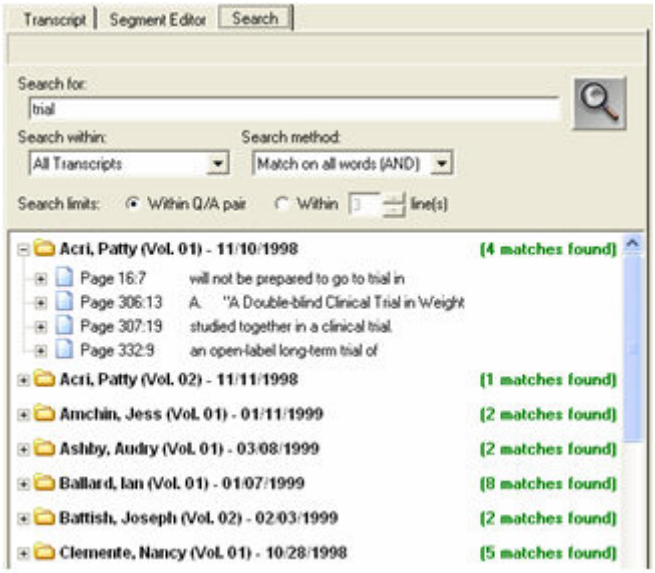
Segment Editor Tab

The Segment Editor tab displays the Waveform Editor, which is used to adjust the start and endpoints of a segment, as well as the Segment Viewer, which allows you to view only the transcript text associated with each segment of the open clip, as shown in the figure below.


Transcript
Segment Editor
Search
BD-0910-0001116 [When you say all of those documents, do you ...]
Start of Segment Audio
End of Segment Audio
Segment
Start Time
End Time
Duration
Page 11:16 to 11:19
00:11:19.851
00:11:27.236
00:00:07.385
Page 12:01 to 12:08
00:11:45.151
00:12:11.318
00:00:26.167
Page 3:22 to 4:21
00:03:32.000
00:04:35.000
00:01:03.000
Page 15:01 to 15:14
00:15:28.000
00:16:10.000
00:00:42.000
Segment #1 (Page 11:16 to 11:19)
Q. When you say all of those documents, do
believe that you received a written response to this
letter of January 25, 1996?
A. Yes, I believe I did.
Segment #2 (Page 12:01 to 12:08)
Q. Do you recall if you wrote this letter o
the same day that you received Mr. Wilson's letter to
you of January 22 that we previously identified as
EX04001?
A. No, it wasn't that same day. I don't
specifically recall. It may have been probably the
following day after I had thought about it through th

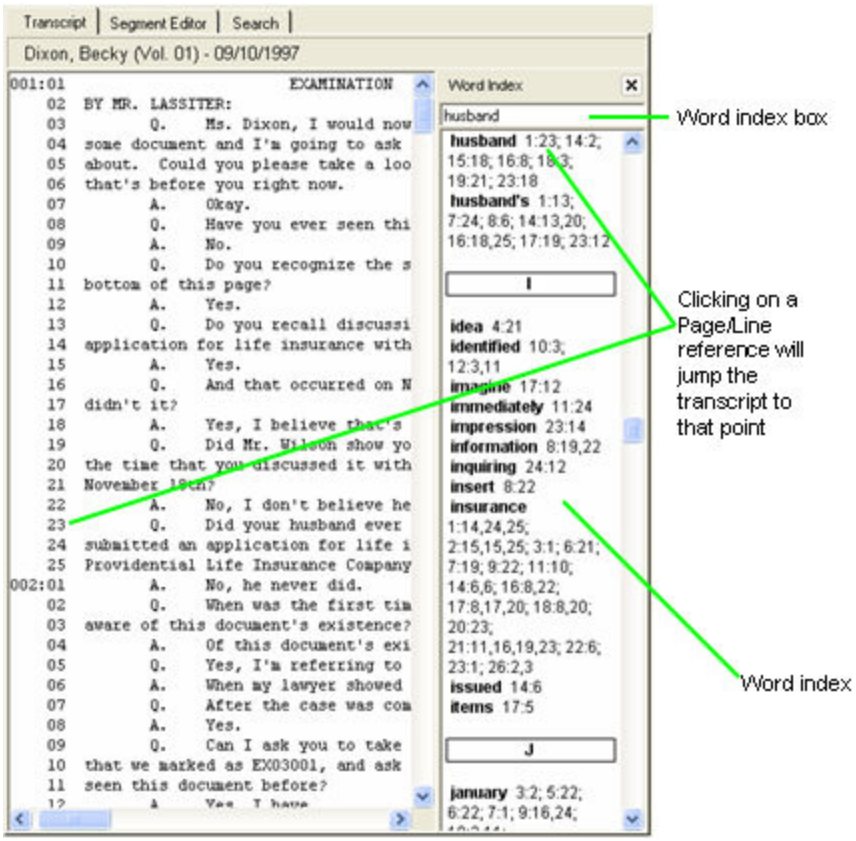
Search Tab

The Search tab allows you to conduct advanced searches across one or multiple transcripts.



Word Index

The Word Index can be opened adjacent to the transcript text by selecting the Word Index command from the View menu. When you type a word into the word index box, the index jumps to the first occurrence of the word in the transcript.

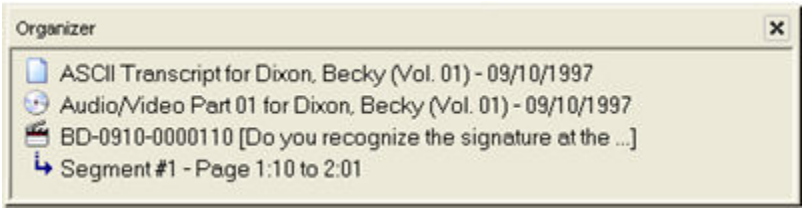


More Information:

- Toolbar
- Case Explorer
- Organizer Window
- Transcript Window and Word Index.

Organizer Window

The Organizer window provides information regarding the active Digital Video Transcript in the transcript viewer. If you have opened a clip within the Digital Video Transcript, the Organize Window will display something similar to the following:


Organizer
ASCII Transcript for Dixon, Becky (Vol. 01) - 09/10/1997
Audio/Video Part 01 for Dixon, Becky (Vol. 01) - 09/10/1997
BD-0910-0000110 [Do you recognize the signature at the ...]
Segment #1 - Page 1:10 to 2:01

You can turn this display off at any time by selecting Organizer from the View menu, or clicking the Close **[X]** button Organizer window.

More Information:

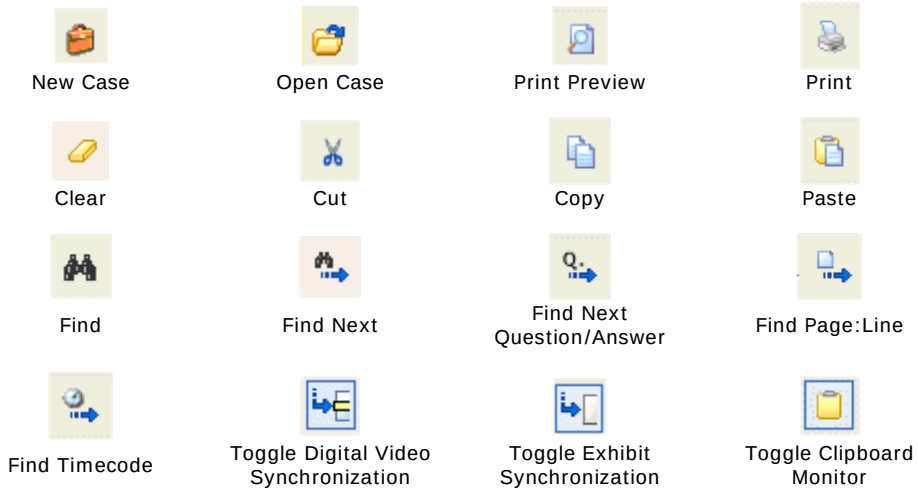
- Toolbar
- Case Explorer
- Transcript Window and Word Index.

Transcript Manager Tool Bar

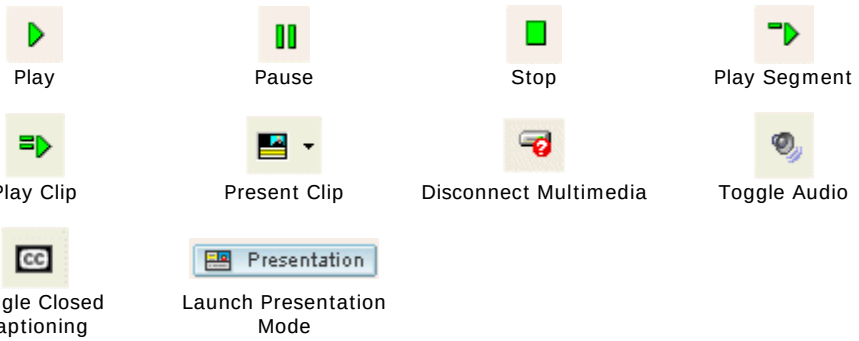
The Transcript Manager Toolbar consists of the Standard Toolbar and Multimedia Toolbar. The toolbars allow quick access to many menu functions available in Transcript Manager.

Click on the Toolbar button below for a description of its function.

Standard Toolbar



Multimedia Toolbar



More Information:

- Toolbar
- Transcript Explorer
- Organizer Window
- Transcript Window and Word Index.

Multimedia Player

Topics:

- Multimedia Player
- Multimedia Control Box
- Segment Editor Mode

Multimedia Player

The Multimedia Player is located in the upper-right corner of the Transcript Manager tab. The Multimedia Player allows you to control the multimedia resources associated with a DVT.

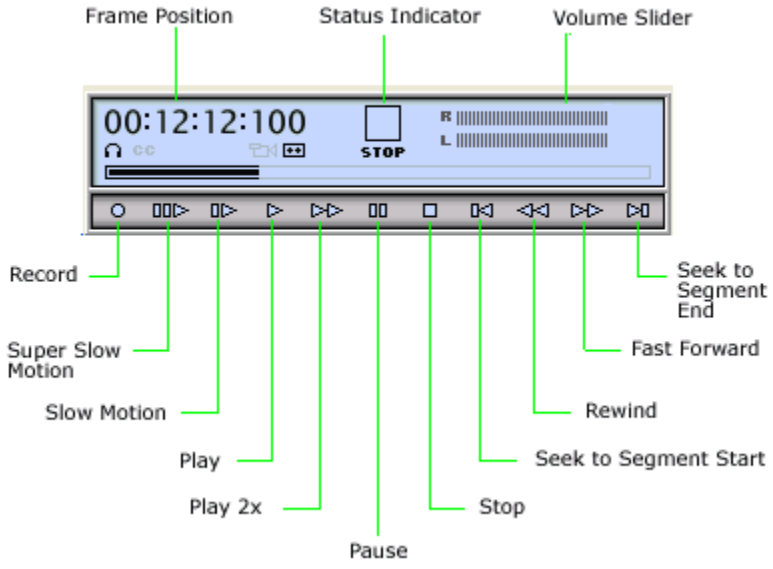
There are two Multimedia modes:

- View Mode allows you to play, pause, stop, rewind and fast forward Digital Video Transcript Multimedia resource. This mode is primarily used to review testimony.
- Edit/Record Mode allows you the additional capability of playing and editing clips and segments.

Multimedia Control Box

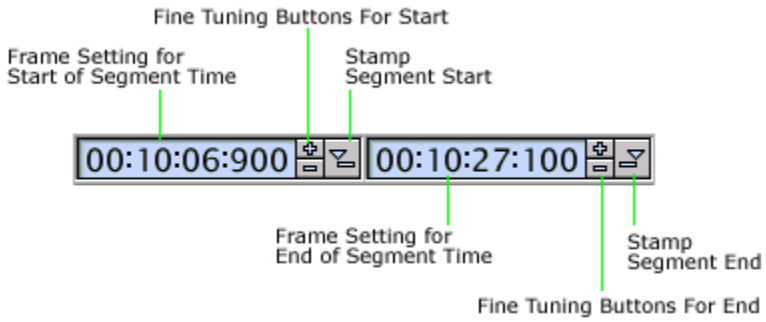
The Multimedia Control Box appears at the bottom of the Multimedia Player and functions similarly to standard VCR controls.

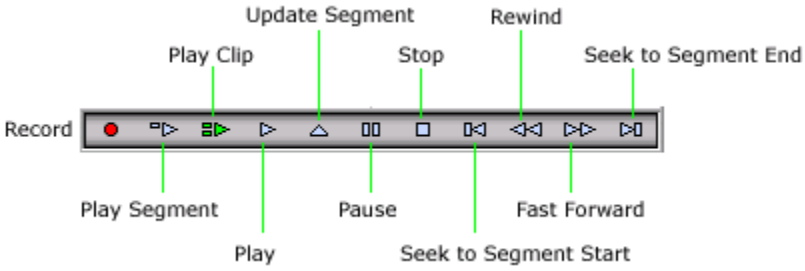
View Mode is used for simple playback of Digital Video Transcripts. The playback status is indicated with a green colored button.

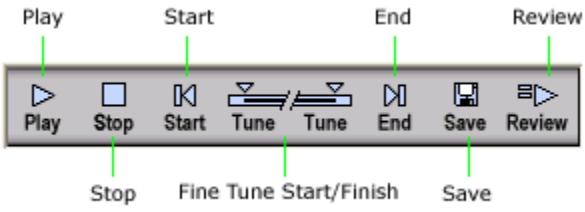


Segment Editor Mode

The Segment Editor Mode is used for editing Digital Video Transcript clips. When the Record Mode is active, the record button will be colored red. The Multimedia Control Box looks like the following:


Fine Tuning Buttons For Start
Frame Setting for Start of Segment Time
Stamp Segment Start
00:10:06:900
00:10:27:100
Frame Setting for End of Segment Time
Stamp Segment End
Fine Tuning Buttons For End





The Frame Position is shown in hours:minutes:seconds:frames (hh:mm:ss:ff) with 30 frames per second.

Note: *See Appendix E for a detailed description of each Multimedia control.*

More Information:

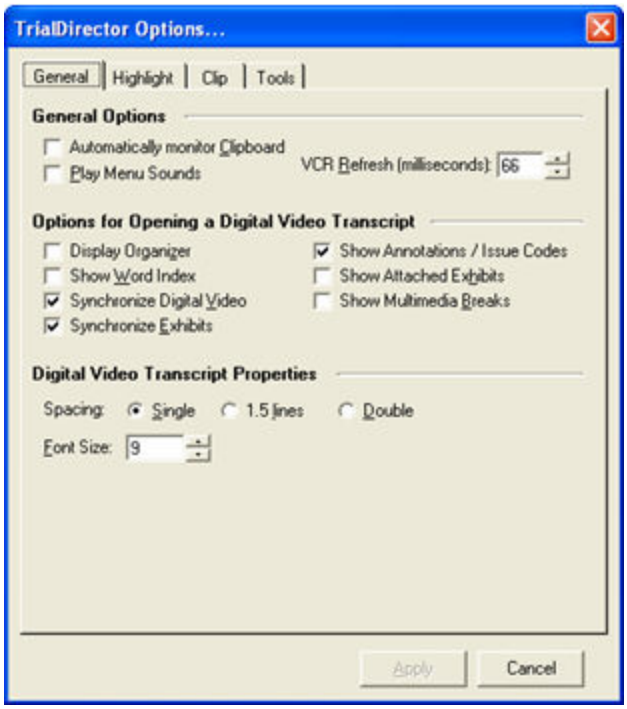
- Options
- Appendix E

Transcript Manager Options

Topics:

- General Tab
- Highlight Tab
- Clip Tab
- Tools Tab

To set the Transcript Manager Options, select **Options** from the View menu.



General Tab

General Options	Description
Automatically Monitor Clipboard	This option makes clipboard linking active by default when you open click the Transcript Manager tab.
Play Menu Sounds	This option will play a "swoosh" sound as the user navigates the menu. Disable this option if you do not want this sound to play.
VCR Refresh	This option determines how often the VCR display is refreshed. The default setting of 333 milliseconds is equivalent to 3 frames per second. The lower the number of milliseconds, the more frequently the screen is refreshed. On computers with slower video cards, refreshing the VCR display frequently may result in a system performance loss.

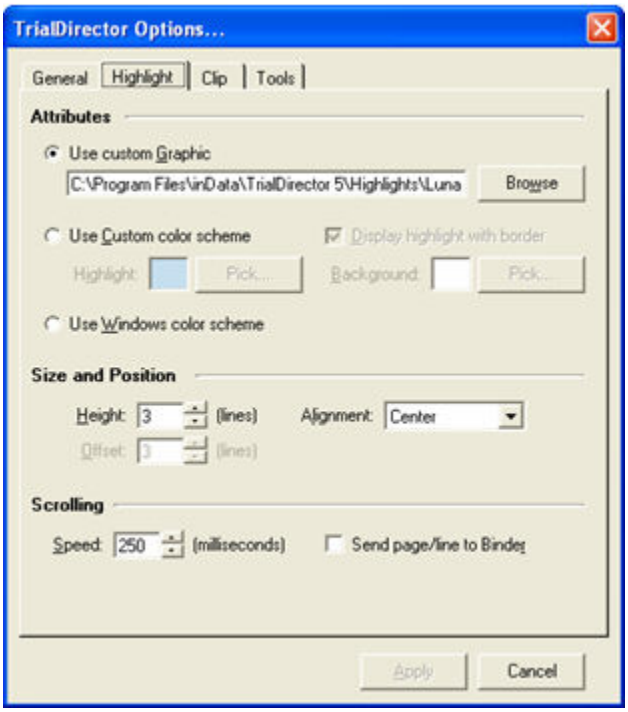
Opening Options	Description
Display Organizer	This option makes the Organize Window visible by default.
Show Word Index	This option will automatically display the Word Index window (for indexed transcripts) each time a Digital Video Transcript is opened.
Synchronize Digital Video	This option makes digital video synchronization active by default when you open a Digital Video Transcript.
Synchronize Exhibits	This option makes exhibit synchronization active by default when you open a Digital Video Transcript.
Show Annotations / Issue Colors	This option will display any annotations or issue codes each time a Digital Video Transcript is opened.
Show Attached Exhibits	This option will display attached exhibit designations each time a Digital Video Transcript is opened.
Show Multimedia Breaks	This option makes beginning of deposition video markers visible by default when you open a Digital Video Transcript.

DVT Properties	Description

Options	
Single	This option single-spaces transcript text.
1.5 Lines	This option spaces transcript text by 1.5 lines.
Double	This option double-spaces transcript text. ***Note:*** *Case data carried over from previous versions of TrialDirector may be double-spaced by blank lines*
Font Size	This option sets the font size in pts.

Highlight Tab

This tab allows you to change the options for the transcript highlight bar that moves through the transcript when the Digital Video Transcript is playing.



Attributes	Description
Use custom Graphic	This option allows you to browse and set a graphic for highlights.

Use custom color scheme	Use this option if you wish to designate distinct colors for the highlight bar and the transcript background.
Highlight	This field allows you to change the color of the highlight bar. Click **[Pick]** to open the color palette and choose an existing color, or create your own.
Background	This field allows you to change the color of the transcript background. Click **[Pick]** to open the color palette and choose an existing color, or create your own.
Display Highlight with Border	Check this box if you want to have a thin black border around the highlight bar.
Use Windows color scheme	Use this option in order to properly display the transcript text and scrolling highlight bar under High Contrast display settings.

Size And Position	**Description**
Height	This field allows you set the height of the highlight bar. Changing to a lower number makes the bar smaller. Changing to a higher number makes the bar bigger.
Offset	This field determines the position of the highlight bar from the top or bottom of the page and works only when the Alignment is set to Align Top or Align Bottom. An Offset of zero (0) and Alignment of Align Top places the highlight bar at the top of the page.
Alignment	This field presents a drop-down list of three choices for the position of the highlight bar: **Align Center**, **Align Top**, and **Align Bottom**. It works in conjunction with the Offset to determine the location of the highlight bar on the transcript.

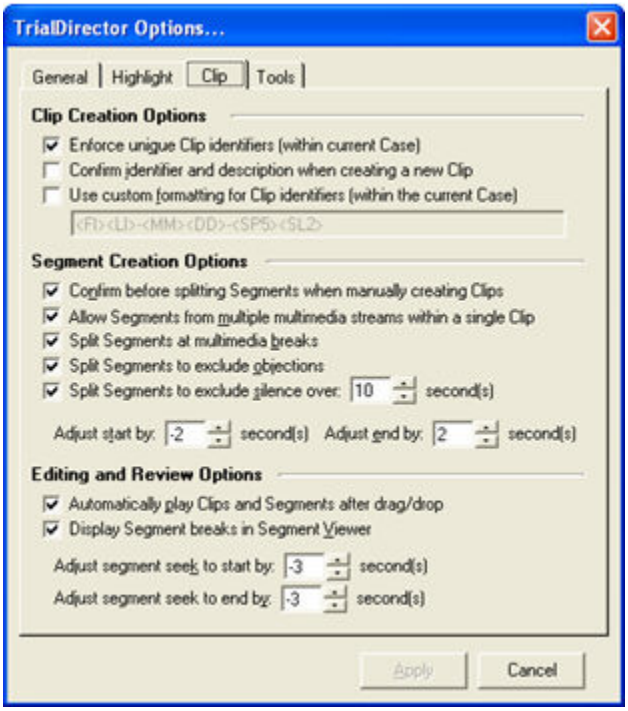
Scrolling	**Description**
Speed	The speed control determines how smoothly the highlight bar moves through the transcript. A value of 100 milliseconds would cause the highlight bar to jump, while a value of 500+ milliseconds would produce a smooth scroll. System performance is affected by increasing the number of steps per scroll, so a compromise between performance and visual

	effects should be made.
Send page/line to Binder	Enabling this option will send the current page/line location of the transcript to RealLegal Binder™ during playback. This option lets the Binder user display a scrolling transcript highlight in that program as TrialDirector plays back the video.

Note: *Users with accessibility needs should enable the Use Windows Color Scheme option.*

Clip Tab

This tab allows you to set the multimedia clip options.


TrialDirector Options...
General
Highlight
Clip
Tools
Clip Creation Options
Enforce unique Clip identifiers (within current Case)
Confirm identifier and description when creating a new Clip
Use custom formatting for Clip identifiers (within the current Case)
<FI><LI><MM><DD><SP5><SL2>
Segment Creation Options
Confirm before splitting Segments when manually creating Clips
Allow Segments from multiple multimedia streams within a single Clip
Split Segments at multimedia breaks
Split Segments to exclude objections
Split Segments to exclude silence over: 10 second(s)
Adjust start by: -2 second(s) Adjust end by: 2 second(s)
Editing and Review Options
Automatically play Clips and Segments after drag/drop
Display Segment breaks in Segment Viewer
Adjust segment seek to start by: -3 second(s)
Adjust segment seek to end by: -3 second(s)
Apply
Cancel

Clip Creation Options	Description
Enforce Unique Clip Identifiers (within current case only)	This option forces each clip to have a unique Clip ID within the same case.

Confirm identifier and description when creating a new Clip	When selected this option will prompt to confirm the information is correct before proceeding to create a new clip
Use custom formatting for clip identifiers	This option allows you to format custom clip identifiers using the codes shown below. For example: **<FI><LI>-<MM><DD>-<SP5><SP2>** Click here to display the available codes ▪ **-** = Separator **Name Formatting** ▪ **<FI>** = First Initial ▪ **<LI>** = Last Initial **Date Formatting** ▪ **<MM>** = Month ▪ **<D>** = Unpadded Day (ex. 5 or 12) ▪ **<DD>** = Padded Day (ex. 05 or 12) ▪ **<M>** - Unpadded month (ex. 2 or 11) ▪ **<MM>** = Padded Month (ex. 02 or 11) ▪ **<YY>** = Short Year (ex. 97 or 03) ▪ **<YYYY>** = Long Year (ex. 1997 or 2003) **Starting Page Formatting** ▪ **<SP>** = Unpadded start page (ex. 1 or 15 or 273) (same as**<SP0>** or **<SP1>**) ▪ **<SP1>** = Padded to at least 1 digit (ex. 1 or 15 or 273) ▪ **<SP2>** = Padded to at least 2 digits (ex. 01 or 15 or 273) ▪ **<SP3>** = Padded to at least 3 digits (ex. 001 or 015 or 273) ▪ (and so on, up to SP9) ▪ **<SP9>** = Padded to at least 9 digits (ex. 000000001 or 000000015 or' 000000273) **Starting Line Number Formatting** ▪ **<SL>** - Unpadded start line (ex. 2 or 15) (same as **<SL0>** or **<SL1>**)

	▪ **<SL1>** = Padded to at least 1 digit (ex. 2 or 15) ▪ **<SL2>** = Padded to at least 2 digits (ex. 02 or 15) **Volume Number Formatting** ▪ **<V>** = Unpadded Volume Number (ex. 1 or 24) ▪ **<VV>** = Padded Volume Number (ex. 01 or 24)

Segment Creation Options	Description
Confirm before splitting Segments when manually creating clips	Enabling this option (default) will prompt the user prior to splitting transcript selections into multiple segments during manual clip creation. The segment split only occurs when encountering objections, multimedia breaks or silence periods. If this option is disabled, the segment is automatically split without user notification.
Allow Segments from multiple multimedia streams within a single Clip	This option allows you to create clips that have segments from multiple multimedia sources. For example, one segment might be from the first CD and another segment from the second CD.
Split segment at multimedia breaks	This option will split a transcript text selection that spans across multimedia breaks and create two separate segments.
Split segments to exclude objections	This option will split a transcript text selection that contains objections and create two separate segments.
Split segments to exclude silence over <set amount of> seconds	This option will split a transcript text selection that contains excessive periods of silence and create two separate segments.
Adjust start by	This option sets the number of seconds by which the start time is adjusted when a segment is created.
Adjust end by	This option sets the number of seconds by which the

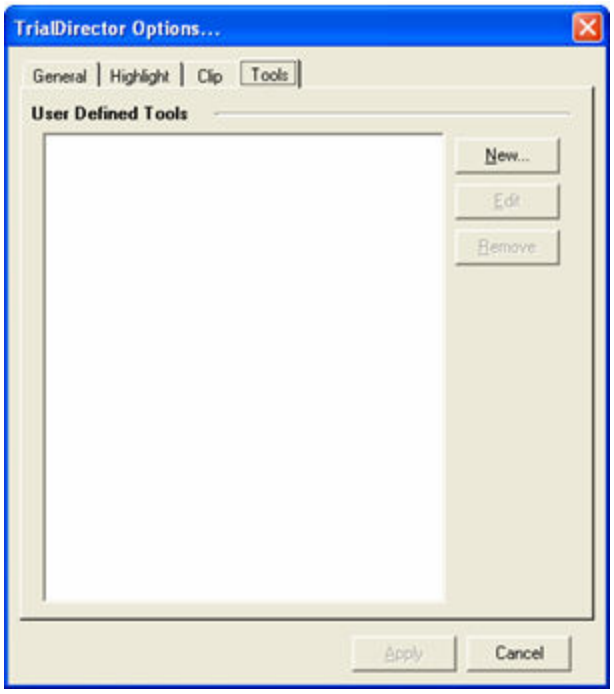
	end time is adjusted when a segment is created.

Review	Description
Automatically play Clips and Segments after drag/drop	This option causes segments and clips to be played automatically when they are dragged and dropped into the Transcript Window.
Display Segment breaks in Segment Editor	This option causes segment breaks to be displayed between the corresponding transcript text for each segment when a clip is loaded in the Segment Editor.
Adjust segment seek to start by	This option sets the number of seconds before or after the segment start time to which the multimedia jumps when you seek to the start of a segment. For example, if the segment seek to start adjustment is set to –2 seconds, and you seek to the start of a segment that begins at 00:00:03:00, the multimedia will automatically jump to 00:00:01:00.
Adjust segment seek to end by	This option sets the number of seconds before or after the segment end time to which the multimedia jumps when you seek to the end of a segment. For example, if the segment seek to end adjustment is set to 2 seconds, and you seek to the end of a segment that ends at 00:00:45:00, the multimedia will automatically jump to 00:00:47:00.

Note: If your Digital Video Transcript timestamps are precise, both of the *Automatically adjust segment time* settings can be set to 0. This would minimize the need for clip editing.

Tools Tab

This tab allows you to add application short-cuts to the Add-Ins menu on the TrialDirector menu bar.



Add-Ins Options	Description
New	Allows you to add a new application short-cut to the Tools menu on the TrialDirector Menu Bar.
Edit	Allows you to edit the path and name of an application short-cut on the TrialDirector Tools menu.
Remove	Allows you to remove an application short-cut from the Tools menu on the TrialDirector Menu Bar.

More Information:

- Options
- Managing Shortcuts to Applications

Working with Transcripts

When a Digital Video Transcript is open, the transcript text appears in the Transcript Window. You can copy, search, and print the transcript text.

What do you want to do?

- Show Multimedia Breaks
- Turn Digital Video Synchronization On or Off
- Mark a Transcript Using Highlighters and Font Colors
- Select Transcript Text
- Search a Transcript
- Print a Transcript
- Export a Transcript
- View Transcript Properties
- Index a Transcript

Digital Video Transcripts

Any multimedia file that has a corresponding ASCII transcript, such as depositions, evidentiary transcriptions and courtroom proceedings, can be converted into a Digital Video Transcript (DVT). The conversion can only be done by an authorized inMotion™ DVT Service Bureau or with TrialDirector's TimeCoder module. (See TimeCoder Help for instructions). The DVT can then be loaded into TrialDirector and edited as needed for trial presentation.

What do you want to do?

- Import a Digital Video Transcript
- Open a Digital Video Transcript
- View a Digital Video Transcript
- Change Digital Video Transcript Properties
- Close a Digital Video Transcript
- Remove Digital Video Transcripts

More Information:

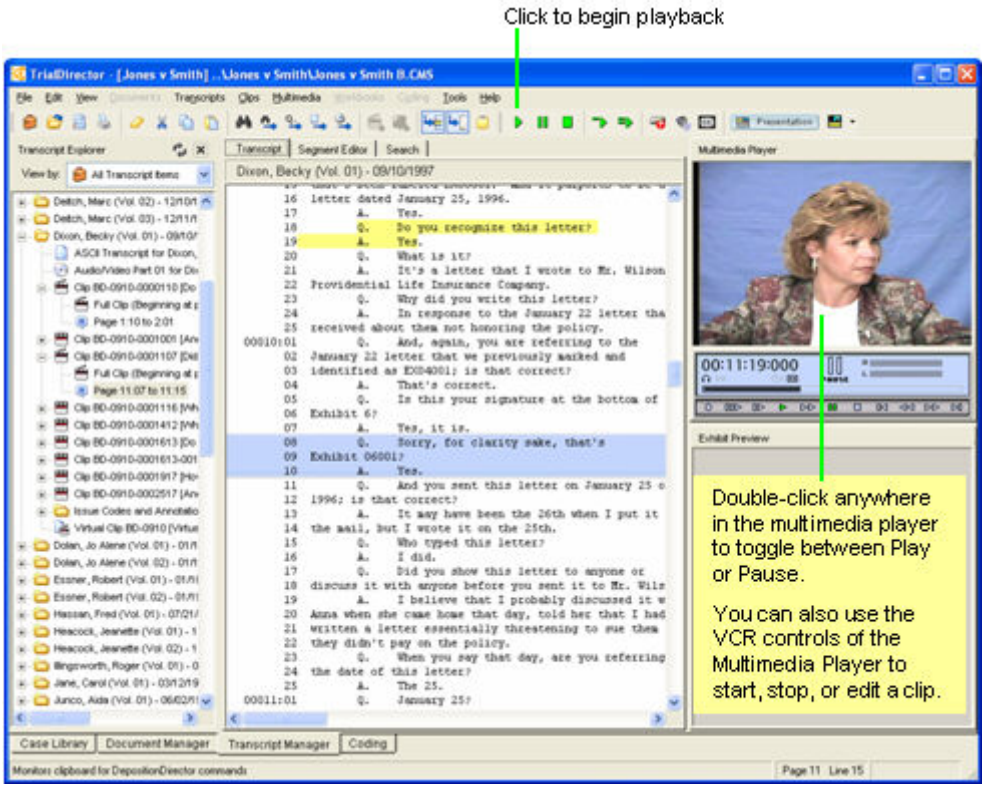
- Transcripts
- Multimedia Resources

View a Digital Video Transcript

Topics:

- Play a Digital Video Transcript
- Pause a Digital Video Transcript
- Stop a Digital Video Transcript
- Change Playback Speed
- Seek in a Digital Video Transcript
- Move Around in a Digital Video Transcript

Digital Video Transcripts can be viewed using the Multimedia Toolbar and Multimedia Player controls, as shown in the figure below. You can also double-click a clip or segment in the Transcript Explorer or segment editor to play the video.


Click to begin playback
Double-click anywhere in the multimedia player to toggle between Play or Pause.
You can also use the VCR controls of the Multimedia Player to start, stop, or edit a clip.

***Note:** The **[Pause]** or **[Break]** key can also be used to toggle playback.*

When you use TrialDirector for the first time, digital video synchronization is enabled by default. However, the setting may be changed in the options so that digital video synchronization is automatically disabled when you open the application. This will also become disabled if you use the vertical scroll bars in the Transcript Window.

Play a Digital Video Transcript

To begin playing a Digital Video Transcript, click the **[Play]** button on either the Toolbar or the Multimedia Control box or select **[Play]** from the Multimedia menu.

Note: *Double-click anywhere in the Multimedia Player while a multimedia file is playing to toggle control between Play and Pause.*

Pause a Digital Video Transcript

To pause a Digital Video Transcript, click the **[Pause]** button on either the Toolbar or Multimedia Control box or select **[Pause]** from the Multimedia menu.

Stop a Digital Video Transcript

To stop a Digital Video Transcript, click the **[Stop]** button on either the Toolbar or Multimedia Control box or select **[Stop]** from the Multimedia menu.

Change Playback Speed

To change the DVT playback speed, select one of the following from the **Multimedia | Playback Speed** menu:

- **Super Slow Motion** to play the DVT at less than slow motion speed.
- **Slow Motion** to play the DVT slower than normal speed.
- **Normal** to play the DVT at regular speed.
- **Double (2x)** to play the DVT at twice normal speed.

The DVT will continue playing at the selected speed until a different speed is selected.

Seek in a Digital Video Transcript

The Seek commands allow you to seek to different parts of a DVT.

To seek to the beginning of a DVT file, do one of the following:

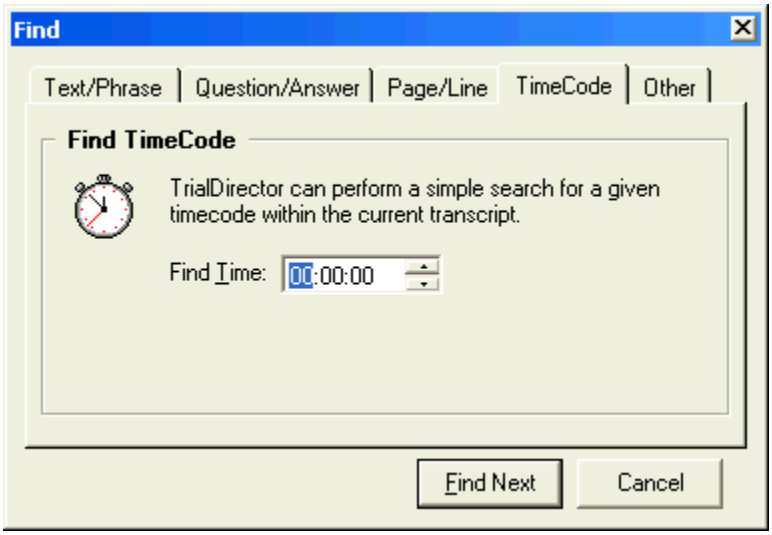
- Click the **Seek To Segment Start** button on the Multimedia Control Box.
- Select **Seek To | Beginning** from the Multimedia menu.

To seek to the end of a DVT file, do one of the following:

- Click the **Seek To Segment End** button on the Multimedia Control Box.
- Select **Seek To | Ending** from the Multimedia menu.

To seek to a particular position in a DVT:

- Select **Seek To | Specific Position** from the Multimedia menu.



The Find dialog will open, with the TimeCode tab active. Enter the desired time in the field provided (HH:MM:SS), then click [Find Next]. The transcript will adjust, placing the highlight bar above the desired text. To view the DVT at that point, click the play button on the toolbar or below the clip in the multimedia player.

Note: *When you click on the scroll bar, digital video synchronization will be disabled.*

Move Around in a Digital Video Transcript

There are three ways to move to a different position in a Digital Video Transcript:

- Use the seek buttons or progress bar on the Multimedia Controls.
- Use the Find command to search the for specific text, lines, times and markers.
- Double-click on the desired line in the Transcript Window.

If the transcript line to which you want to move is not visible in the Transcript Window, use the vertical scroll bar to locate the desired transcript line.

Note: *When you click on the scroll bar, digital video synchronization will be disabled.*

When the multimedia seeks to the desired position in the Digital Video Transcript, the multimedia status will remain the same (e.g., if the multimedia was playing when the jump was made, it will automatically begin playback from the new position).

Note: *Digital video synchronization should be enabled when moving around in a Digital Video Transcript.*

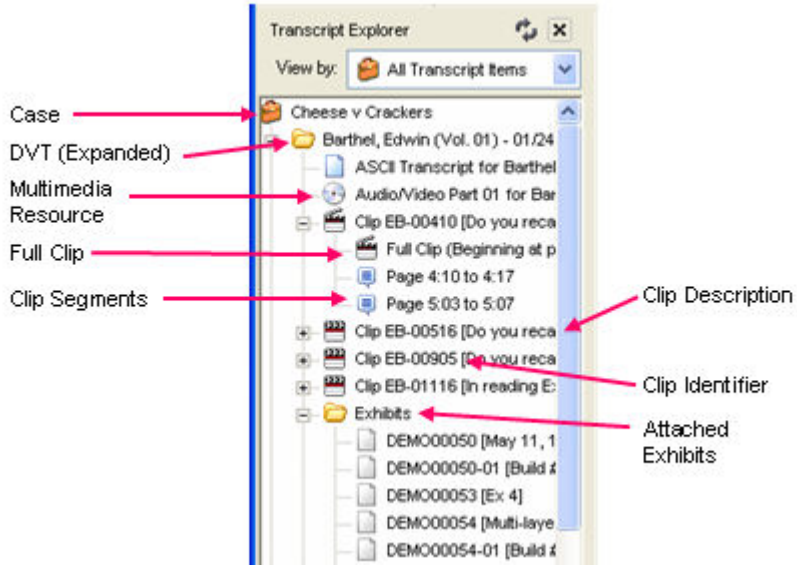
More Information:

- Digital Video Transcript
- Import a Digital Video Transcript
- Open a Digital Video Transcript
- Change Digital Video Transcript Properties
- Close a Digital Video Transcript
- Remove Digital Video Transcripts

Open a Digital Video Transcript

To view Digital Video Transcript information, click the plus sign **[+]** in front of one of the cases found in the Transcript Explorer.

The transcript text, multimedia, and clip information is displayed.



There are three ways to open a Digital Video Transcript:

- Double-click on the transcript or multimedia file.
- Right-click on the transcript, multimedia file or Digital Video Transcript folder and select **[Open]** or **[Play]** from the drop-down menu.
- Click on the multimedia and drag and drop the file into the Multimedia Manager. This method is especially useful when you are missing the first multimedia volume in the Digital Video Transcript because it allows you to load a subsequent volume first.

Both the transcript and the multimedia are loaded regardless of which one you open.

Note: *Transcripts that have not been indexed appear with a yellow exclamation point within the Case Explorer. It is safe to open these transcripts. However, it is recommended to index transcripts in order to take advantage of the Word Index and Printing functions.*

Note: *If TrialDirector cannot find the volume that contains the Digital Video Transcript multimedia, a dialog box will appear to prompt you to mount the volume (see Change CD's) or provide the correct path.*

Upon opening, the transcript appears in the Transcript Window and the multimedia is loaded in the Multimedia manager. The Digital Video Transcript does not automatically begin playback.

More Information:

- Digital Video Transcript
- Import a Digital Video Transcript
- Open a Digital Video Transcript
- View a Digital Video Transcript
- Change Digital Video Transcript Properties
- Close a Digital Video Transcript
- Remove Digital Video Transcripts

Close a Digital Video Transcript

To close the current Digital Video Transcript,

- Select **Close Digital Video Transcript** from the Transcripts menu
- Right-click on the Transcript Window and select **Close Digital Video Transcript** from the shortcut menu.

More Information:

- Digital Video Transcript
- Import a Digital Video Transcript
- Open a Digital Video Transcript
- View a Digital Video Transcript
- Change Digital Video Transcript Properties

- Close a Digital Video Transcript
- Remove Digital Video Transcripts

Turn Digital Video Synchronization On or Off

When digital video synchronization is enabled, the highlight bar will follow along in the transcript as the multimedia plays.

To disable synchronization, do one of the following

- Click the **Enable or Disable Digital Video Synchronization** button on the Toolbar. Click the button again to enable synchronization.
- Select **Digital Video Synchronization** from the Transcript Menu.

Note: *Clicking on the scroll bar in the Transcript Window will automatically disable the synchronization.*

More Information:

- Digital Video Transcript
- Transcript Text

Clips and Segments

Clips

A clip consists of one or more segments of a Digital Video Transcript that can be played successively. Clips are used to capture pertinent testimony without interruptions, such as objections or irrelevant information.

What do you want to do?

- Create a Clip
- Open an Existing Clip
- Add Segments to a Clip
- Play a Clip
- Edit a Segment
- Remove a Segment

- Use the Segment Viewer
- Copy a Segment to Another Clip
- Change Clip Properties
- Present a Clip in TrialDirector
- Close a Clip
- Remove Clip(s)
- Export Clips to Clip Creation Script
- Generate Excerpts from Clips

Play a Clip

To play a specific clip, open the transcript folder, expand the desired clip folder, and double-click on the Full Clip icon. You can also right-click on Full Clip and select **[Play]** from the shortcut menu.

You can also play an open clip by clicking the **[Play]** button on either the Toolbar or Multimedia Control Box.

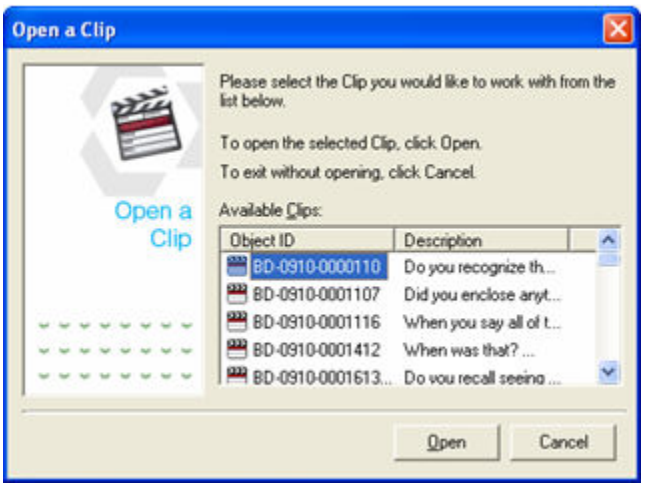
More Information:

- Digital Video Transcript
- Clips

Open an Existing Clip

To open an existing clip,

1. Select **Open a Clip** from the Clip menu.



Note: *The Object ID and Description columns can be sorted by simply clicking on the column heading.*

2. Select the desired clip and click **[Open]** or double-click on the clip. Clips are listed in alphabetical order by clip description. To exit without opening a clip, click **[Cancel]**.

You can also open an existing clip by right-clicking on the clip in the Transcript Explorer and selecting **[Open]** from the shortcut menu.

More Information:

- Digital Video Transcript
- Clips

Close a Clip

To close the current clip, either:

- Select **Close Clip** from the Clips menu
- Right-click on the Transcript Window and select **Close Clip** from the shortcut menu.

Note: *Opening any other clip will automatically close the current clip.*

More Information:

- Digital Video Transcript
- Clips

Create a Clip

Topics:

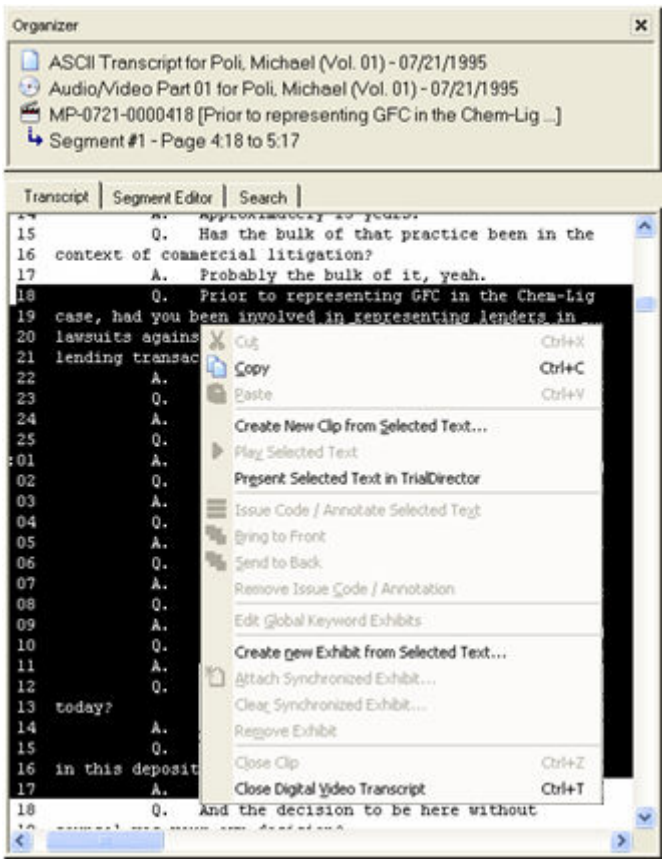
- One Step Clip Creation
- Create a Clip Using the Clip Wizard
- Create a Clip Using a Script File
- Create a New Clip Container

Transcript Manager allows you to create clips using the clip wizard, a clip creation script, or by selecting transcript text and adding it to the clip. Transcript Manager automatically does the audio and video editing.

One Step Clip Creation

To create a new DVT Clip in a single step, follow the instructions below.

1. Click and drag to highlight the range of required transcript text
2. Right-click and choose **Create New Clip from Selected Text**, as shown below. The clip will be automatically created without any additional user interaction.


Organizer
ASCII Transcript for Poli, Michael (Vol. 01) - 07/21/1995
Audio/Video Part 01 for Poli, Michael (Vol. 01) - 07/21/1995
MP-0721-0000418 [Prior to representing GFC in the Chem-Lig ...]
Segment #1 - Page 4:18 to 5:17
Transcript
Segment Editor
Search
Q. Has the bulk of that practice been in the
context of commercial litigation?
A. Probably the bulk of it, yeah.
Q. Prior to representing GFC in the Chem-Lig
case, had you been involved in representing lenders in
lawsuits agains
lending transac
today?
in this deposit
Q. And the decision to be here without
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
Create New Clip from Selected Text...
Play Selected Text
Present Selected Text in TrialDirector
Issue Code / Annotate Selected Text
Bring to Front
Send to Back
Remove Issue Code / Annotation
Edit Global Keyword Exhibits
Create new Exhibit from Selected Text...
Attach Synchronized Exhibit...
Clear Synchronized Exhibit...
Remove Exhibit
Close Clip Ctrl+Z
Close Digital Video Transcript Ctrl+T

One Step Clip Creation: The newly created clip is automatically opened for review, editing or presentation.

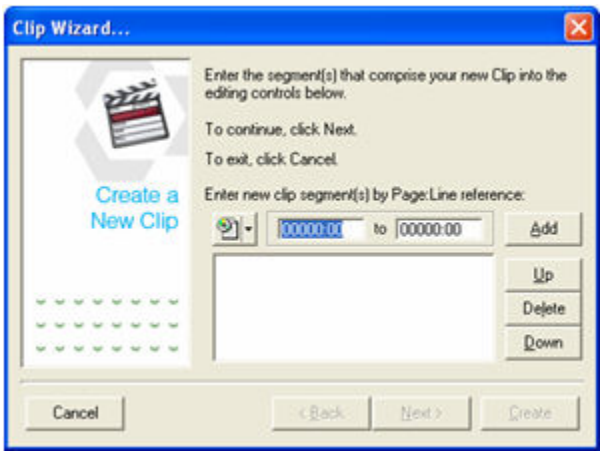
Note: *To prevent prompts to split segments that occur over objections, multimedia breaks and silent areas of the transcript, disable the "Confirm before splitting segments…" option on the Clip tab of the Transcript Manager Options dialog .*

Create a Clip Using the Clip Wizard

The Clip Wizard allows you to easily create a clip by selecting the transcript line or timecode ranges you want to include in each segment.

Follow these steps to create a clip using the clip wizard:

1. Open the desired Digital Video Transcript.
2. Select **Clip Wizard** from the Clips menu.



Note: *The Clip Wizard is designed to input clip segment information using the 10-key pad. Use the period character when entering page-line references. The Clip Wizard will automatically convert to a colon.*

The default format for defining clip segment boundaries is by Page/Line reference. The Page/Line reference format is as follows:

Format	Description
00004:07	
00004	Page Number
07	Line Number

Click the Page/Line format button to switch to TimeCode reference format. The TimeCode reference format is as follows:

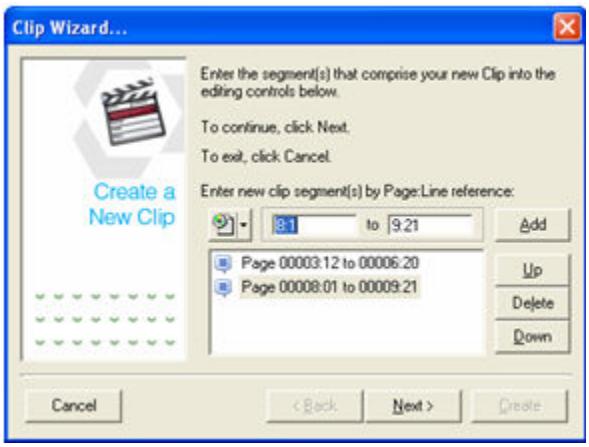
Format	Description
03:40:15	
03	Hours
40	Minutes
15	Seconds

Click the TimeCode format button to switch back to Page/Line reference format.

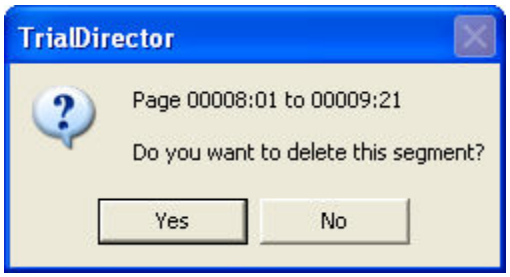
3. Enter the desired beginning and ending segment positions.
4. Click **Add** to add the defined segment to the clip.

5. Repeat steps 3 and 4 for all subsequent segments in the clip.

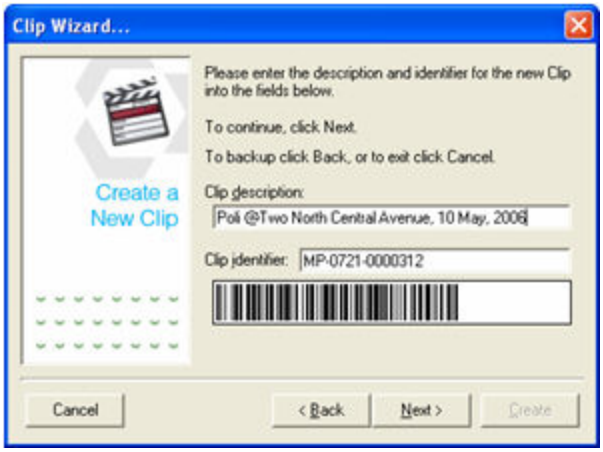
When you are finished, the window will look similar to the following:



To change the segment position in the clip, click the desired segment and click **Up** to move it up one segment or **Down** to move it down one segment. To delete a segment, select the desired segment and click **Delete**.



6. Click **Yes** to delete the segment or **No** to cancel the deletion.
7. Click **Next** when you have finished defining the clip segments.


Clip Wizard...
Please enter the description and identifier for the new Clip into the fields below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Create a New Clip
Clip description:
Poli @Two North Central Avenue, 10 May, 2006
Clip identifier:
MP-0721-0000312
Cancel
< Back
Next >
Create

Note: *The barcode picture is displayed merely for visual appearance.*

The default clip description consists of the first words of the first segment, and the default clip identifier is based on the deponent, deposition date, and transcript page and line number.

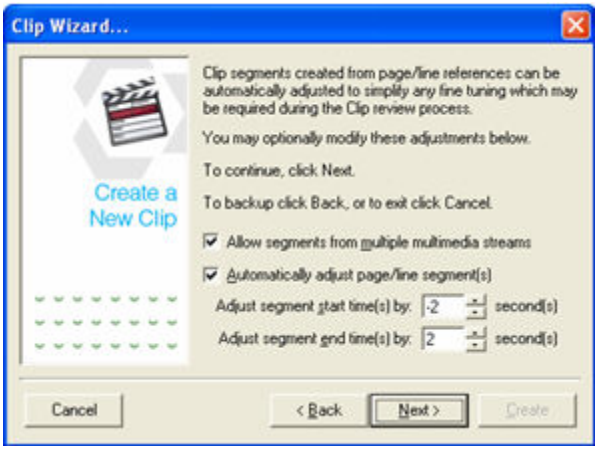
For example, the following identifier is broken down as follows:

Component	Description
MP-0721-0000714	
MP	Michael Poli (deponent)
0721	Deposition Date
00007	Page Number
14	Line Number

Both the clip description and the clip identifier can be modified, if desired.

Note: *The Clip Identifier is the same as the Object ID in Transcript Manager, thus, is used to pull up the clip in Presentation mode by typing it in or scanning the corresponding barcode. Because of this, you may want to edit this field to remain consistent with your established naming convention.*

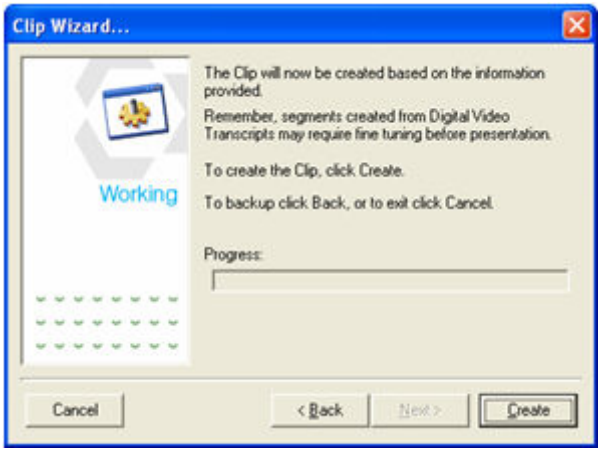
8. Click **Next** to continue.


Clip Wizard...
Clip segments created from page/line references can be automatically adjusted to simplify any fine tuning which may be required during the Clip review process.
You may optionally modify these adjustments below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Create a New Clip
Allow segments from multiple multimedia streams
Automatically adjust page/line segment(s)
Adjust segment start time(s) by: -2 second(s)
Adjust segment end time(s) by: 2 second(s)
Cancel
< Back
Next >
Create

9. Check the ***Allow segments from multiple multimedia streams*** option if you think your clip will span more than one multimedia file. This option will be automatically checked if the option is enabled in the *Options* dialog. If you want to automatically adjust the beginning and ending positions of the clip segments, make sure the **Automatically Adjust Page/Line Segment(s)** option is selected.

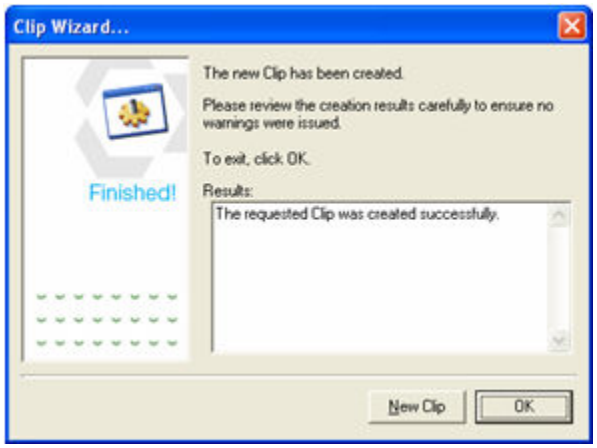
- Use the arrow buttons to increase or decrease the start and end segment adjustments by one second at a time.

10. Click **Next** to accept the segment adjustment selections and continue the clip creation process.


Clip Wizard...
The Clip will now be created based on the information provided.
Remember, segments created from Digital Video Transcripts may require fine tuning before presentation.
To create the Clip, click Create.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Create

- If the timestamps within the Digital Video Transcript are accurate, the created clip should need only minimal fine tuning.

11. Click **Create** to create the clip.
12. When the progress bar reaches the end, click **Next** to continue.

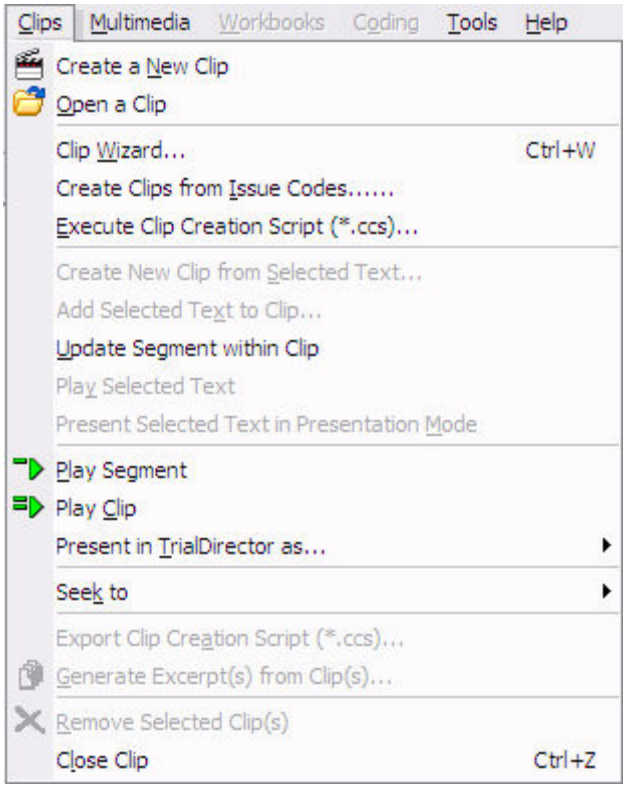


13. Review the clip creation results to ensure that the process was completed successfully. Click **OK** to exit the clip creation process or click **New Clip** to begin creating the next clip using the clip wizard.

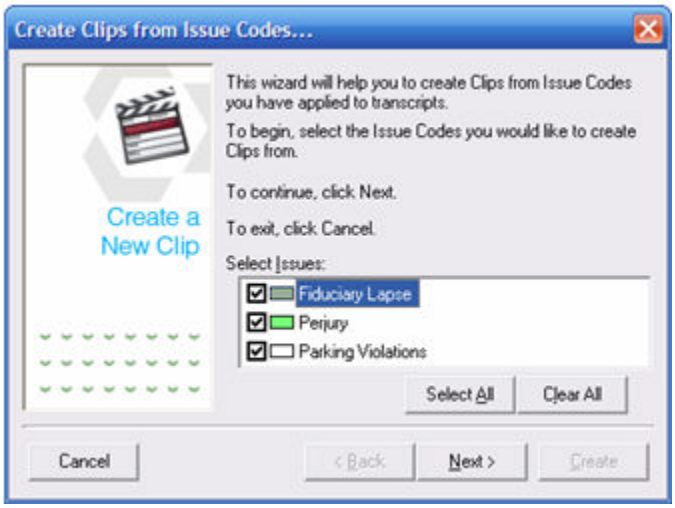
Create Clips From Issue Codes

You can create clips from any issue codes applied to your transcripts.

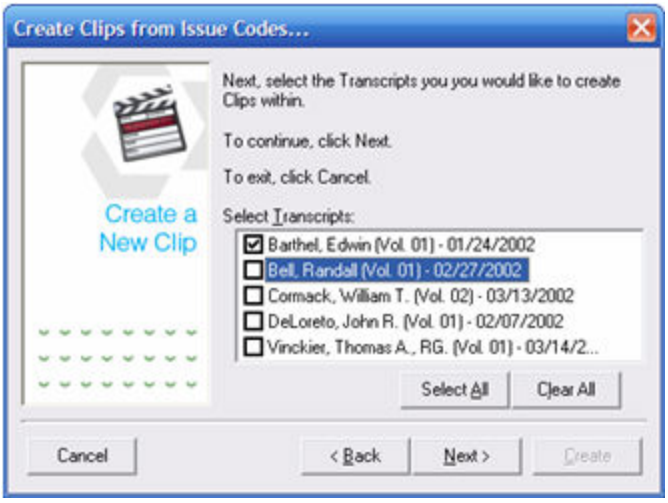
1. From the Clips menu, select the Create Clips from Issue Codes Command.



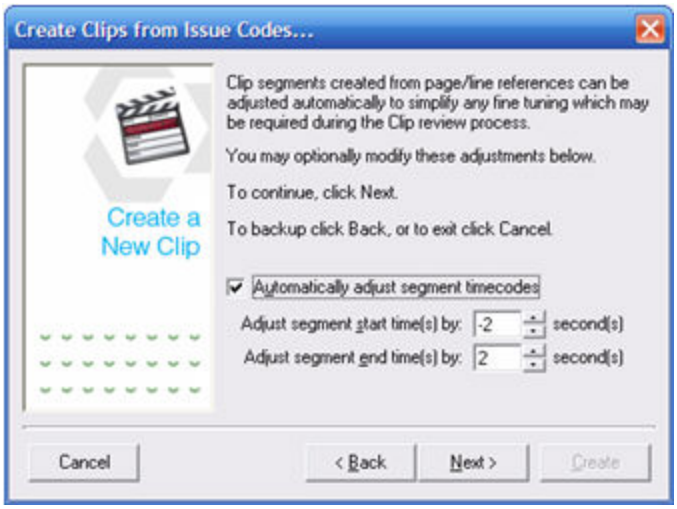
2. Select the issue codes that you would like to create the clips from.


Create Clips from Issue Codes...
Create a New Clip
This wizard will help you to create Clips from Issue Codes you have applied to transcripts.
To begin, select the Issue Codes you would like to create Clips from.
To continue, click Next.
To exit, click Cancel.
Select Issues:
Fiduciary Lapse
Perjury
Parking Violations
Select All
Clear All
Cancel
< Back
Next >
Create

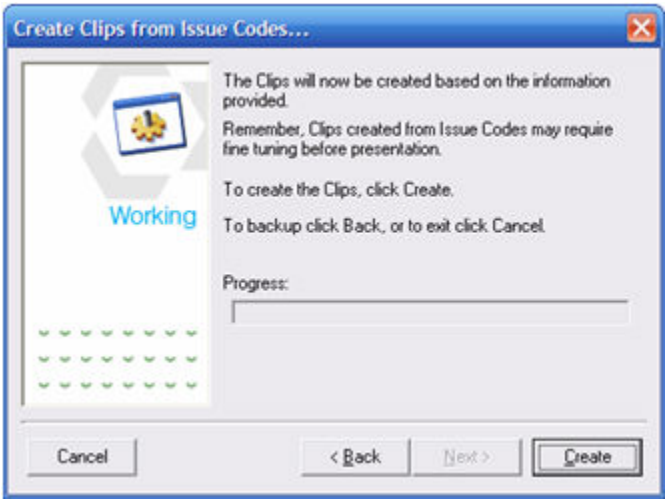
3. Select the transcripts that the clips will be generated from.


Create Clips from Issue Codes...
Create a New Clip
Next, select the Transcripts you you would like to create Clips within.
To continue, click Next.
To exit, click Cancel.
Select Transcripts:
Barthel, Edwin (Vol. 01) - 01/24/2002
Bell, Randall (Vol. 01) - 02/27/2002
Cormack, William T. (Vol. 02) - 03/13/2002
DeLoreto, John R. (Vol. 01) - 02/07/2002
Vinckier, Thomas A., RG. (Vol. 01) - 03/14/2...
Select All
Clear All
Cancel
< Back
Next >
Create

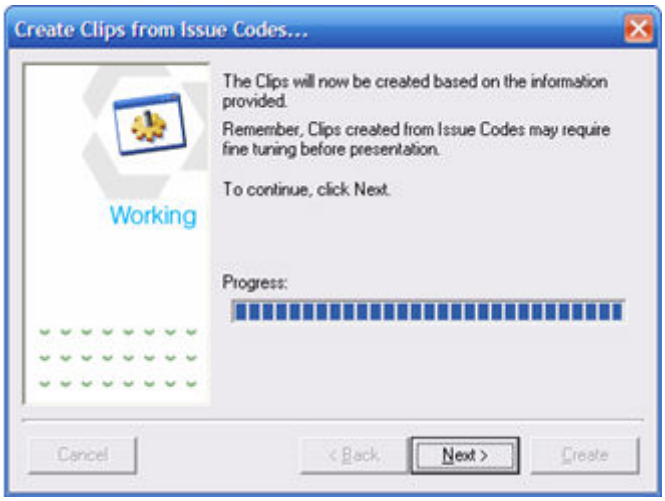
4. You can add additional time to the clips if desired. Click **Next** to continue.


Create Clips from Issue Codes...
Create a New Clip
Clip segments created from page/line references can be adjusted automatically to simplify any fine tuning which may be required during the Clip review process.
You may optionally modify these adjustments below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Automatically adjust segment timecodes
Adjust segment start time(s) by: -2 second(s)
Adjust segment end time(s) by: 2 second(s)
Cancel
< Back
Next >
Create

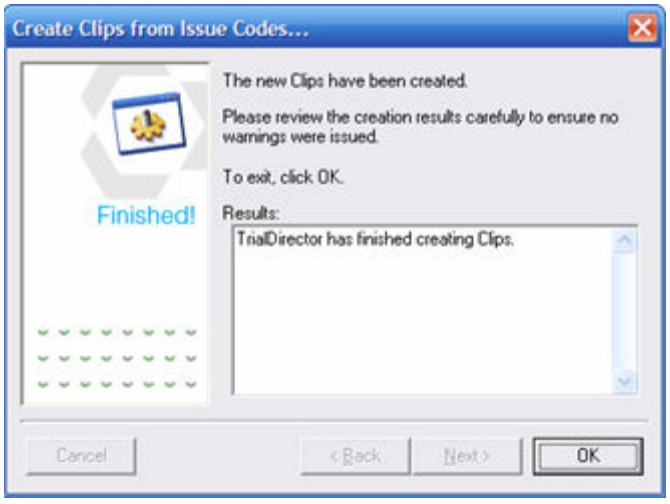
5. Click **Create** to begin the clip creation process.


Create Clips from Issue Codes...
Working
The Clips will now be created based on the information provided.
Remember, Clips created from Issue Codes may require fine tuning before presentation.
To create the Clips, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

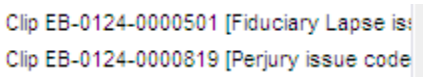
6. Click Next.


Create Clips from Issue Codes...
The Clips will now be created based on the information provided.
Remember, Clips created from Issue Codes may require fine tuning before presentation.
To continue, click Next.
Working
Progress:
Cancel
< Back
Next >
Create

7. The following screen is displayed when the clips have been created.


Create Clips from Issue Codes...
The new Clips have been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
TrialDirector has finished creating Clips.
Cancel
< Back
Next >
OK

8. Clips are added to the Clips folder for the individual transcripts in the Transcript Explorer.



Create a Clip Using a Script File

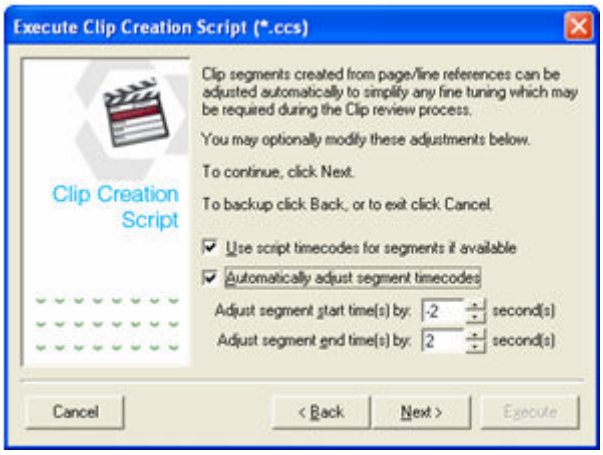
A clip creation script file (*.ccs) is an ASCII file that can be used to create multiple segment clips automatically. A script file also offers the ability to open Digital Video Transcripts and override the default clip identifiers and/or descriptions generated by the Transcript Manager.

1. To use a script file, select **Execute Clip Creation Script (*.ccs)** from the Clips menu.

Execute Clip Creation Script (*.ccs)
Clip Creation Script
This wizard will help you to create Clips using a special creation script.
Enter a path and filename for the Clip Creation Script (*.ccs) you would like to execute below.
To continue, click Next.
To exit, click Cancel.
Select the script path and filename:
Browse...
Cancel
< Back
Next >
Execute

Note: *The source script can be located on a local or external hard disk, floppy, network drive or UNC path.*

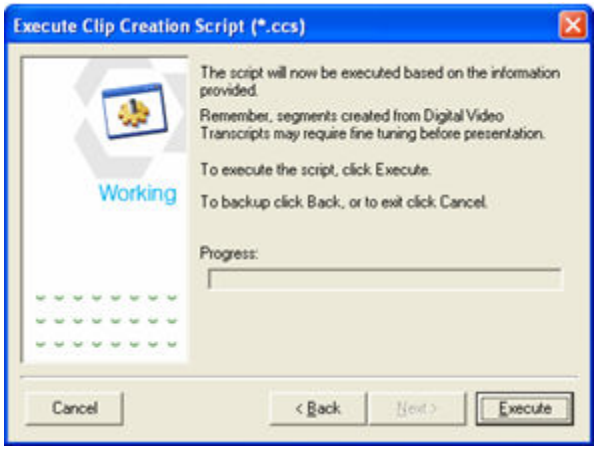
2. Click **Browse** to navigate to the desired Clip Creation Script (*.ccs) file.
3. From the resulting navigational window, select the desired *.ccs file and click **Open** or double-click on the filename to return to the Execute Clip Creation Script (.ccs) window.
4. When the correct path and filename is displayed, click **Next** to continue.


Execute Clip Creation Script (*.ccs)
Clip Creation Script
Clip segments created from page/line references can be adjusted automatically to simplify any fine tuning which may be required during the Clip review process.
You may optionally modify these adjustments below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Use script timecodes for segments if available
Automatically adjust segment timecodes
Adjust segment start time(s) by: -2 second(s)
Adjust segment end time(s) by: 2 second(s)
Cancel
< Back
Next >
Execute

Note: *If you are using script timecodes, it is recommended to not adjust segment timecodes.*

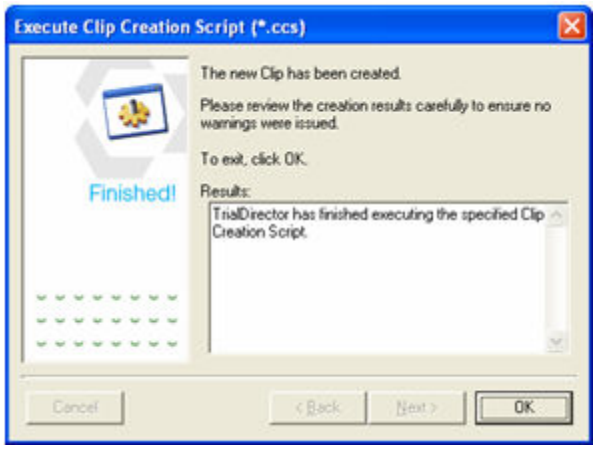
Note: *If you want to use the timecodes embedded in the script file, ensure the 'Use script timecodes for segments if available' option is selected.*

5. Use the arrow buttons to increase or decrease the start and end segment adjustments by one second at a time.
6. Click **Next** to accept the segment adjustment selections and continue the clip creation process.


Execute Clip Creation Script (*.ccs)
The script will now be executed based on the information provided.
Remember, segments created from Digital Video Transcripts may require fine tuning before presentation.
To execute the script, click Execute.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Execute

Note: *Make sure the transcript pertaining to the *.ccs file is opened, if the deponent name is not specified within the script.*

7. Click **Execute** to begin creating clips using the script file. When the progress bar reaches the end, click **Next** to continue.
8. This window displays the clip creation results. If any errors have occurred, they will be displayed here. Click **OK** to return to the Transcript Manager tab.


Execute Clip Creation Script (*.ccs)
The new Clip has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
TrialDirector has finished executing the specified Clip Creation Script.
Cancel
< Back
Next >
OK

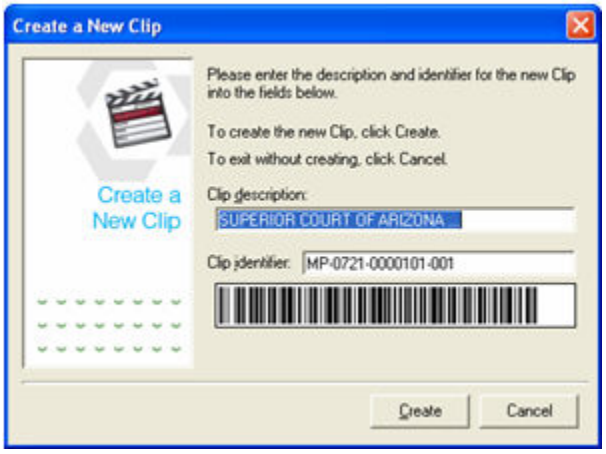
Note: *The results dialog will inform the user if the specified DVT cannot be found.*

Create a New Clip Container

TrialDirector allows you to create empty clips to which text selections can be added as segments at a later time.

Follow these steps to create a clip container:

1. Open the desired Digital Video Transcript.
2. Choose **Create a New Clip** from the Clip menu.


Create a New Clip
Please enter the description and identifier for the new Clip into the fields below.
To create the new Clip, click Create.
To exit without creating, click Cancel.
Create a New Clip
Clip description:
SUPERIOR COURT OF ARIZONA
Clip identifier:
MP-0721-0000101-001
Create
Cancel

- The Clip Identifier defaults to the Deponent Initials - Deposition Date - Page|Line reference of the newly created clip.
- Both the clip description and the clip identifier can be modified, if desired.

3. Click **Create** to create the new clip or **Cancel** to exit.

The clip is created and opened, but remains empty until you add segments.

More Information:

- Digital Video Transcript
- Clips

Remove Clip(s)

1. To remove clip(s), select the clip(s) you would like to remove by doing one of the following:
    - To remove one clip, click on the clip you would like to remove in the Transcript Explorer.
    - To remove multiple clips, set the **View by** selector to Clip(s) in the Transcript Explorer. Click in the box next to the clips you would like to remove.
2. When you have selected the clip(s) you would like to remove, do one of the following:
    - Choose **Remove Selected Clip(s)** from the Clips menu.
    - Right-click on the selected clip(s) and select **Delete** from the shortcut menu.

The clips are removed from the DVT.

More Information:

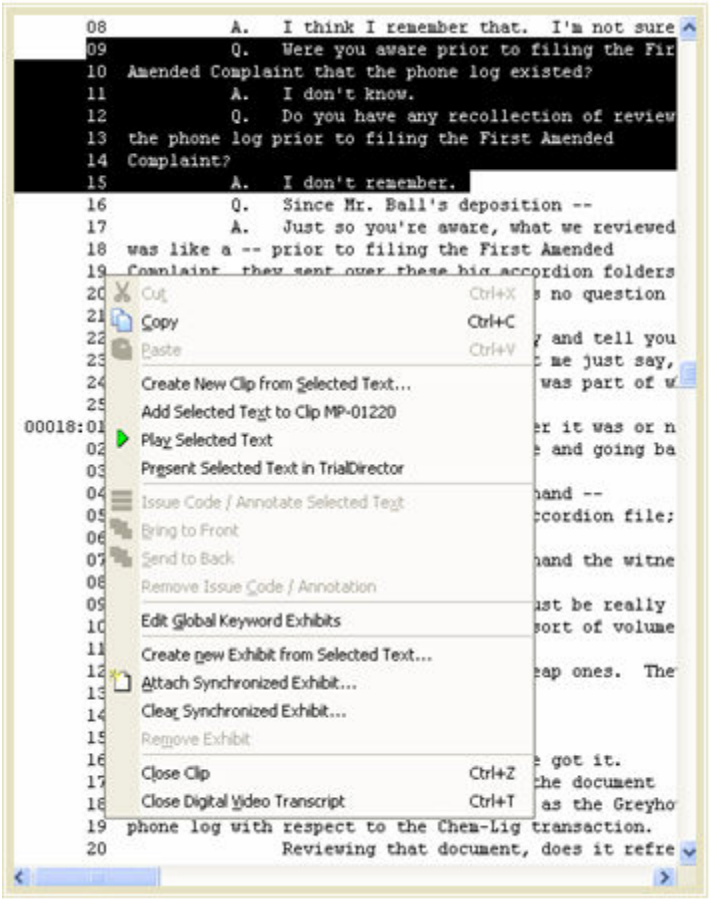
- Digital Video Transcript
- Clips

Add Segments to a Clip

A segment is one continuous piece of a Digital Video Transcript that can be added to a clip. Segments can be added to new or existing clips, and there is no limit to the number of segments that can be added to a clip. Follow these steps to add a segment to a clip:

1. Highlight the transcript text you would like to add as a segment to the open clip.
2. Use one of the following methods
    - Click the **[Add Selected Text To Current Clip]** toolbar button
    - Select **Add Selected Text To Clip (Clip ID)** from the Clips menu
    - Right-click on the Transcript Window and choose **Add Selected Text To Clip (Clip ID)** from the shortcut menu.

    The segment is automatically added to the open clip.


A. I think I remember that. I'm not sure
Q. Were you aware prior to filing the Fir
Amended Complaint that the phone log existed?
A. I don't know.
Q. Do you have any recollection of reviewing
the phone log prior to filing the First Amended
Complaint?
A. I don't remember.
Q. Since Mr. Ball's deposition --
A. Just so you're aware, what we reviewed
was like a -- prior to filing the First Amended
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
Create New Clip from Selected Text...
Add Selected Text to Clip MP-01220
Play Selected Text
Present Selected Text in TrialDirector
Issue Code / Annotate Selected Text
Bring to Front
Send to Back
Remove Issue Code / Annotation
Edit Global Keyword Exhibits
Create new Exhibit from Selected Text...
Attach Synchronized Exhibit...
Clear Synchronized Exhibit...
Remove Exhibit
Close Clip Ctrl+Z
Close Digital Video Transcript Ctrl+T
phone log with respect to the Chem-Lig transaction.
Reviewing that document, does it refre

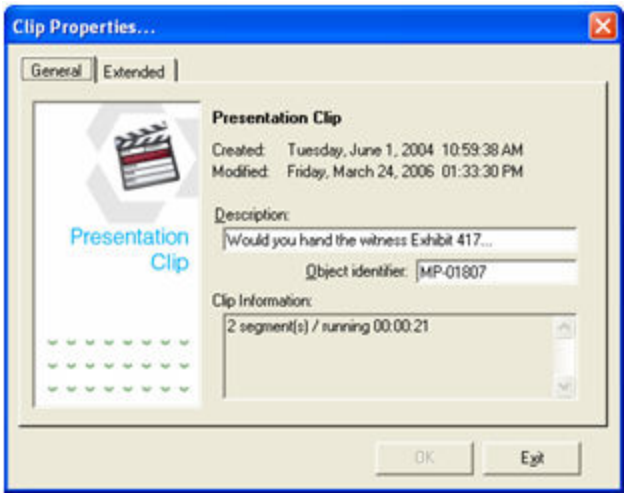
3. Add additional segments as desired.
4. Once the segments are created, you can edit the endpoints to ensure that they begin and end at the correct positions.

More Information:

- Digital Video Transcript
- Clips

Change Clip Properties

Transcript Manager allows you to change the clip identifier (Item ID) and clip description. To change the clip properties, right-click on the desired clip and select **Properties** from the shortcut menu. The Clip Properties window will open.



The *Clip Information* section lists the number of segments and total running time for the clip.

Rename Clips

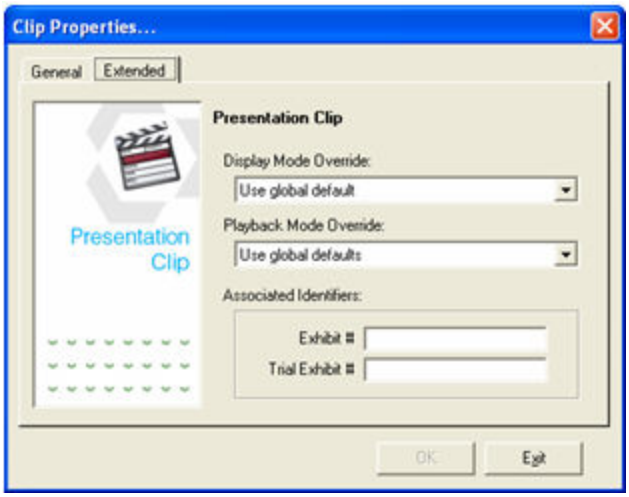
To rename a clip, open the Properties dialog for the desired clip. On the General tab, type a new name for the exhibit in the Object identifier field and click **[Apply]** to save the changes or **[Exit]** to abandon the changes.

Change Clip Descriptions

To change a clip description, open the Properties dialog for the desired clip. On the General tab, type a new description for the clip in the Description field and click **[Apply]** to save the changes or **[Exit]** to abandon the changes.

Display Mode or Playback Mode Override

To change Display Mode Override properties, open the Properties dialog for the desired clip. On the Extended tab, use the drop-down menus to set Override options. Click **[Apply]** to save the changes or **[Exit]** to abandon the changes.



Display Mode Override options are:

Option	Description
Use Global Default	Accepts the default settings from the TrialDirector Preferences.
Display Video and Text	Causes this clip to display as Video and Text.
Display Text Only	Causes this clip to display only the transcript Text.
Display Video Only	Causes this clip to display only the video portion of the DVT.

Playback Mode Override options are:

Option	Description
Use Global Default	Accepts the default settings from the TrialDirector Preferences.
Play at Start/Stop at End	Causes this clip to play from start to finish, then close when finished.
Pause at Start/Pause at End	Causes this clip to open in a paused mode, and pause at the end without closing.
Play at Start/Fade at End	Causes this clip to play when started, and to fade out when finished.

More Information:

- Digital Video Transcript
- Clips

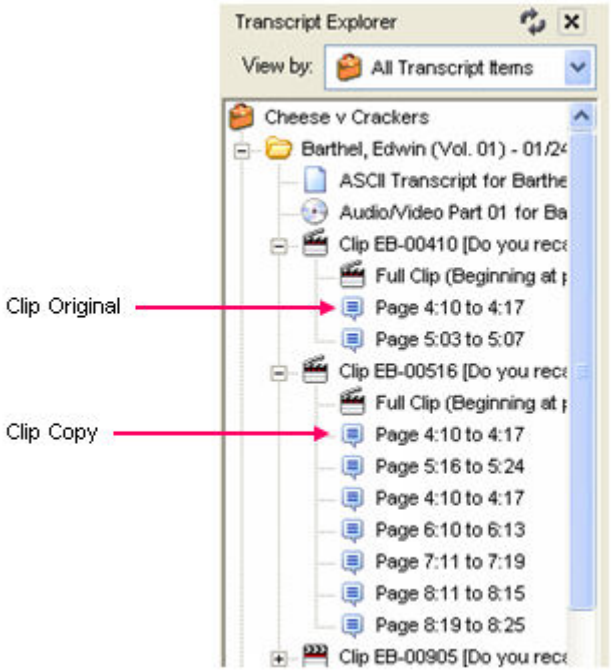
Copy Segments to Another Clip

Topics:

- Copy Segments within Case Explorer
- Copy Segments from Segment Viewer

Copy Segments within Case Explorer

In Transcript Manager, you have the ability to take a segment and copy it from one clip to another. To do this simply click and drag the segment from the current location to the new location. A copy of the segment will be created at the new location.



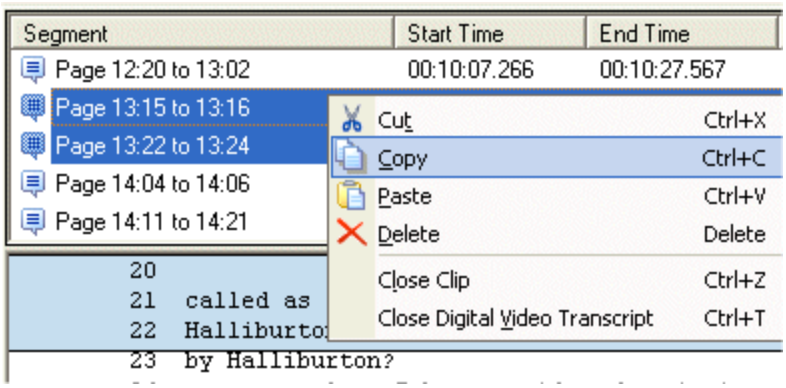
If you wish to copy more than one segment at once, use the Segment Editor to select multiple clip segments.

Copy Segments using the Segment Editor

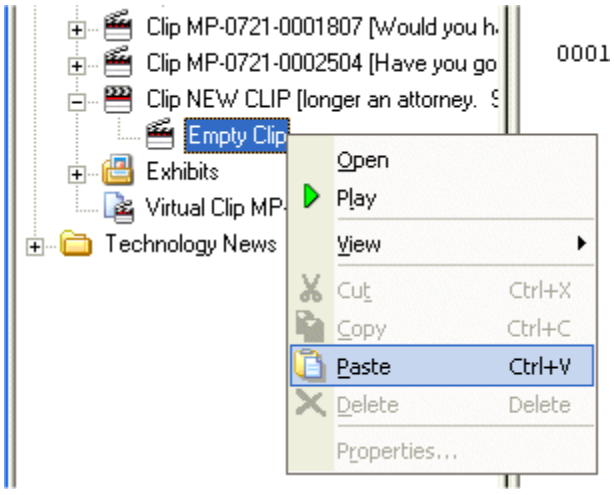
The Transcript Manager Segment Editor allows you to cut/copy and paste one or more segments from one clip to another. To do this, open the clip you wish to cut/copy the segments from. Click the Segment Editor tab.

Note: *Using the* ***[Cut]*** *command will move the segment from one clip to another. The* ***[Copy]*** *command will create a copy of the segment(s) in the target clip.*

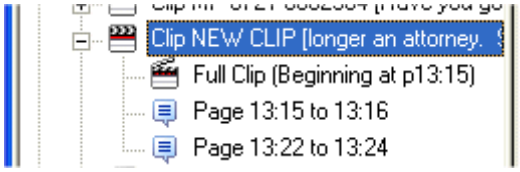
1. Select the segments, right-click and select either **[Cut]** or **[Copy]** from the shortcut menu.



2. Select the **[Full Clip]** icon or *Segment* icon where you wish to paste the segments. Right-click and select **[Paste]** from the shortcut menu.



3. The segments will appear in the Transcript Explorer at the insertion point. Remember, the segments can be inserted into any part of a clip.



More Information:

- Digital Video Transcript
- Clips

The Segment Editor

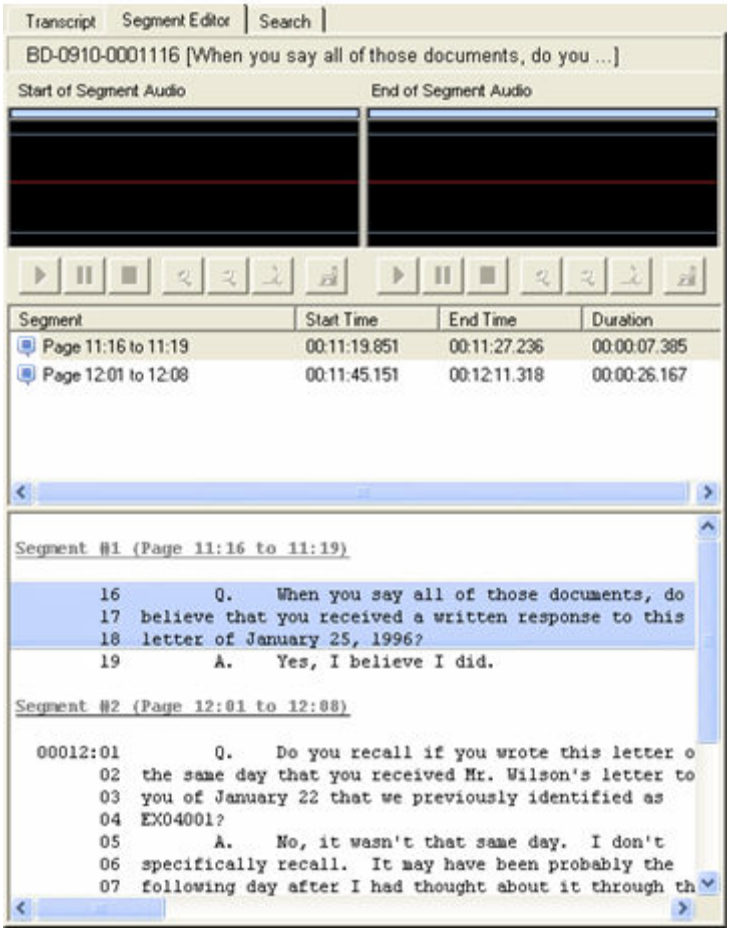
Topics:

- Hide Segment Breaks in the Segment Editor
- Add Segments to a Clip
- Delete Segments in a Clip
- Rearrange Segments in a Clip

The Segment Editor is used to organize the segments in a clip. It lists the segments contained in the current clip of the corresponding transcript, in the order in which they are played. (If no clip is open, the Segment Editor is empty.) You can also use the Segment Editor to adjust the start and end points for segments.

To view the segments in a clip using the Segment Editor:

1. Open a clip from the Transcript Explorer or **Clips** menu.
2. Click the **Segment Editor** tab at the top of the Transcript Window, as shown in the figure below.


Transcript
Segment Editor
Search
BD-0910-0001116 [When you say all of those documents, do you ...]
Start of Segment Audio
End of Segment Audio
Segment
Start Time
End Time
Duration
Page 11:16 to 11:19
00:11:19.851
00:11:27.236
00:00:07.385
Page 12:01 to 12:08
00:11:45.151
00:12:11.318
00:00:26.167
Segment #1 (Page 11:16 to 11:19)
16 Q. When you say all of those documents, do
17 believe that you received a written response to this
18 letter of January 25, 1996?
19 A. Yes, I believe I did.
Segment #2 (Page 12:01 to 12:08)
00012:01 Q. Do you recall if you wrote this letter o
02 the same day that you received Mr. Wilson's letter to
03 you of January 22 that we previously identified as
04 EX04001?
05 A. No, it wasn't that same day. I don't
06 specifically recall. It may have been probably the
07 following day after I had thought about it through th

By default, the segment text is separated to allow for easy review. Also, the segments within the current clip are listed in order. The clip will automatically begin playing if the Automatically play clips and segments after drag/drop option is selected in the Transcript Manager options.

Hide Segment Breaks in the Segment Editor

If you would like to prevent the segment breaks from appearing, disable the **Display Segment Breaks in Segment Editor** option from the Clip tab in the Transcript Manager options.

Add Segments to a Clip

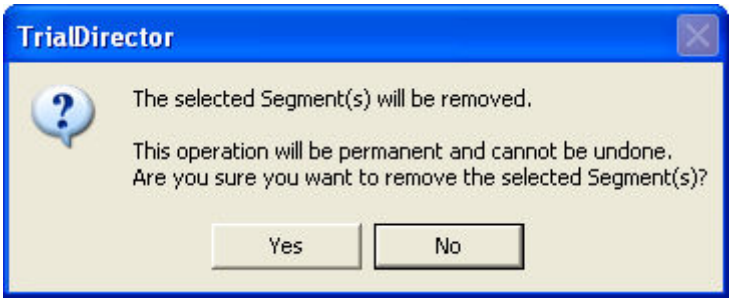
To add segments to a clip in the Segment Editor, use the mouse to select a segment in the Transcript Explorer. Click and drag the cursor to the position in the list of segments where you would like to insert the selected segment and release the mouse.

You can also right-click on a segment in the Transcript Explorer and select **[Cut]** or **[Copy]** from the shortcut menu. Place the cursor at the position in the list of segments where you would like to insert the selected segment, right-click and select **[Paste]** from the shortcut menu.

Delete Segments in a Clip

To delete a segment from a clip in the Segment Editor,

1. Select the segment you would like to delete, right-click and choose **[Delete]** from the shortcut menu.


TrialDirector
The selected Segment(s) will be removed.
This operation will be permanent and cannot be undone.
Are you sure you want to remove the selected Segment(s)?
Yes
No

2. Click **[Yes]** to delete the segment(s) or **[No]** to cancel the deletion.

Rearrange Segments in a Clip

To rearrange the current order of the segments in a clip, click on a segment you would like to reposition, drag the cursor to a new position in the list, and release the mouse.

You can also right-click on the segment you would like to reposition and select **[Cut]** or **[Copy]** from the drop-down menu. Place the cursor at the position in the list of segments where you would like to insert the segment, right-click and select **[Paste]** from the drop-down menu.

Note: *Using the Copy command will cause the segment to remain in its original position and a copy of the segment to be inserted at the new position.*

More Information:

- Digital Video Transcript
- Clips
- Update Segment Start or Stop Times

Update Segment Start or Stop Time

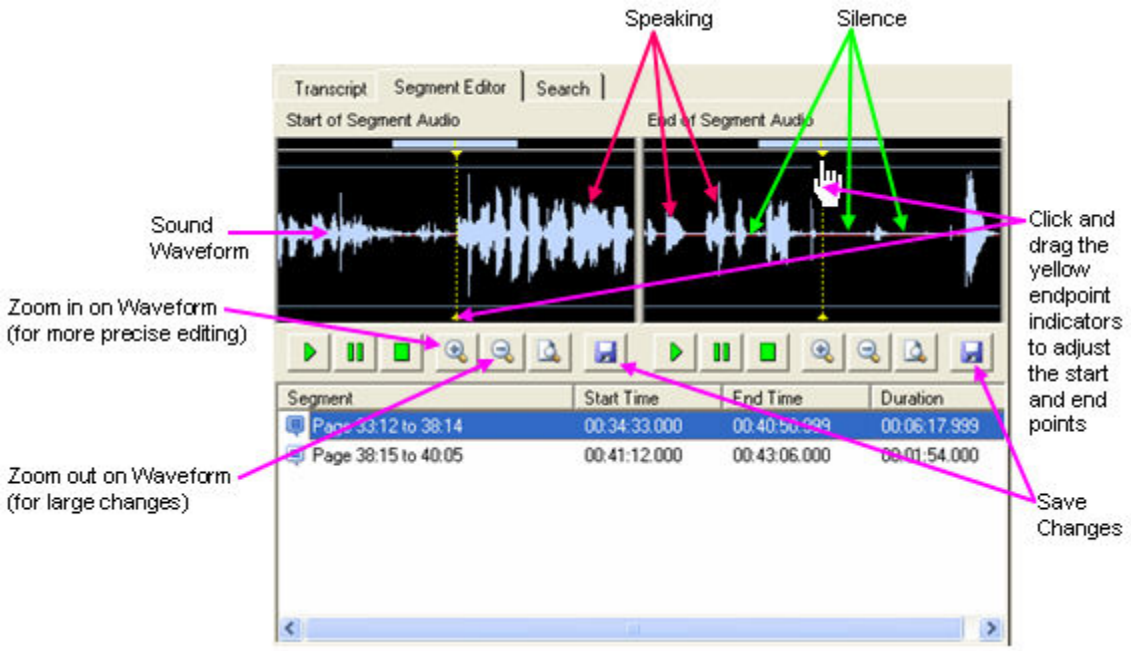
The Transcript Manager allows you to edit each segment in the clip so that they will begin and end at the exact positions desired when you present the clip in Presentation mode. There are two techniques for doing this: using the Waveform Editor or using the VCR controls.

Update Segment Start and End Times Using the Waveform Editor

Note: *There are a small number of file types which are not supported by the Waveform Editor. If the segment that you are editing uses one of these formats, the message "Unsupported Multimedia Format" will display in the waveform space.*

Follow these steps to edit a segment:

1. Click the Segment Editor tab to display the editing tools.
2. Click the clip in the Transcript Explorer that contains the desired segment to start the desired clip. Go to the VCR controls and click the stop button.
3. In the segment list of the Segment Editor, click on the segment that you want to edit to display the start and end points.



Note: The Segment Editor times are shown in **Hours:Minutes:Seconds:Milliseconds**

3. To review the start point for the clip, click Play in the VCR controls below the **Start of Segment Audio** panel and listen to audio track. Click Pause to stop the playback.

4. To increase the amount of silence at the beginning of the segment, drag the yellow endpoint indicator left toward a silent area of the waveform.
   To decrease the amount of silence, drag the endpoint indicator right toward the speaking area of the waveform.

Note: *You can use the zoom controls to facilitate finer or coarser adjustments.*

5. Use the same technique in the **End of Segment Audio** panel to adjust the endpoint for the segment.
6. Repeat as necessary for each desired segment. Click the Save icon to save the changes.

Update Segment Start and End Times Using VCR Controls

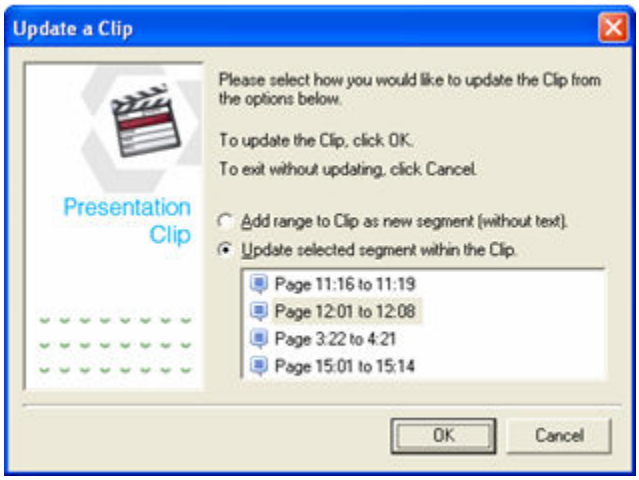
Follow these steps to edit and update the segment start and end times:

1. Open the desired clip and click on the desired segment to make it active. The Segment Editor should reflect the segment times, as shown in the figure below.

2. Play the segment to determine whether you need to advance or reverse frames at the beginning and/or ending of the segment.
3. Use the plus **[+]** and minus **[-]** buttons next to the start and stop times to adjust the beginning and ending times as needed.

Note: *You can also stamp the current time into the Segment Editor by clicking the* ***Stamp Segment Start*** *or* ***Stamp Segment End*** *button.*

4. Replay the segment to determine if further editing is needed.
5. When you have finished editing, click **[Update Segment]** or **[Save]** . The Update a Clip dialog opens.


Update a Clip
Please select how you would like to update the Clip from the options below.
To update the Clip, click OK.
To exit without updating, click Cancel.
Presentation Clip
Add range to Clip as new segment (without text).
Update selected segment within the Clip.
Page 11:16 to 11:19
Page 12:01 to 12:08
Page 3:22 to 4:21
Page 15:01 to 15:14
OK
Cancel

Note: *The current segment is selected by default.*

The default selection is to update the segment within the clip that was active in the Case Explorer. Whichever segment is highlighted in the dialog box will be the one that is updated with the segment times currently displayed in the Segment Editor.

You can also choose to save the current segment times as a new segment within the clip; however, it will not be synchronized with any corresponding transcript text.

6. Click **[OK]** to update the selected segment with the adjusted times or **[Cancel]** to cancel the segment update.

Note: *If you do not update the segment and you click on something else in the Transcript Explorer, you will lose the adjusted settings.*

Segment times adjusted from the original.

More Information:

- Digital Video Transcript
- Clips

Remove a Segment

To delete a specific segment within a clip,

1. Expand the appropriate clip folder,
2. Right-click on the desired segment within the clip folder
3. Select **[Delete]** from the shortcut menu.

More Information:

- Digital Video Transcript
- Clips

Generate Excerpts from Clips

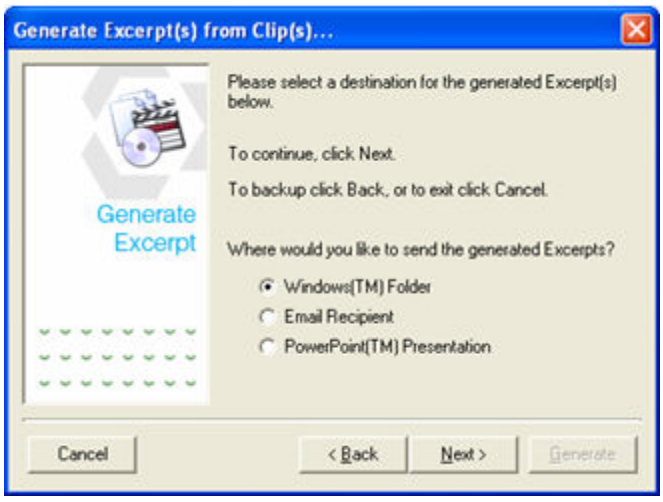
Generating excerpts lets users extract precise pieces of deposition video, reducing file sizes from gigabytes down to megabytes, allowing the resulting video to be shared more easily. The excerpt files can be e-mailed to associates, opposing counsel, or expert witnesses.

This process will create an MPEG file, with embedded text captions. The text captions are comprised of the transcript text associated with the DVT Clips. The text captions can be synchronized to the video stream.

1. Click the Transcript Manager tab and select **View by Clips** in the Transcript Explorer.
2. Choose the clips you want to make excerpts for by selecting the check box next to each desired clip.
3. Select the **Generate Excerpt(s) From Clip(s)** option under the Clips menu. The following dialog will appear.

Generate Excerpt(s) from Clip(s)...
This wizard will help you to generate Excerpt(s) from one or more selected Clip(s).
An Excerpt is a subset of transcript and/or multimedia which has been extracted from the original source for use in trial, production requests, jury review, etc.
Generate Excerpt
To continue, click Next.
To exit, click Cancel.
What would you like to do?
Generate Excerpt(s) from All Clip(s)
Generate Excerpt(s) from only Selected Clip(s)
Cancel
< Back
Next >
Generate

4. Select either the **Generate Excerpts From All Clips** or **Generate Excerpts From Selected Clips** option, as shown above.
5. Click the **[Next]** button to continue. The following screen will appear.

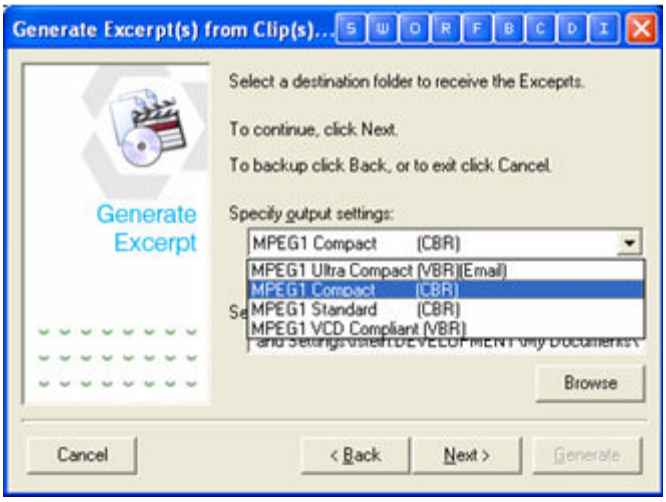

Generate Excerpt(s) from Clip(s)...
Please select a destination for the generated Excerpt(s) below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Where would you like to send the generated Excerpts?
Windows(TM) Folder
Email Recipient
PowerPoint(TM) Presentation
Generate Excerpt
Cancel
< Back
Next >
Generate

6. Select the destination for the excerpts, then click **[Next]**. Excerpts can be sent to a system folder, attached to an e-mail for delivery to another party, or sent to a PowerPoint presentation.

From this point, the wizard presents different screens depending on which destination you have selected.

Send to Windows Folder:

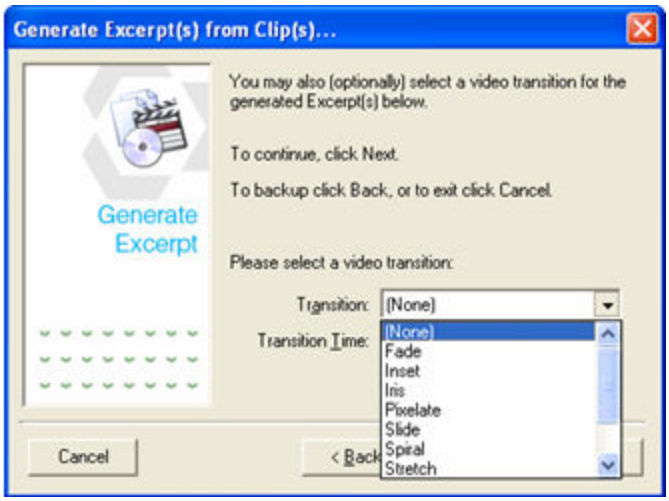
1. If you select the Windows Folder option, specify the output settings, then click the **[Browse]** button to select a path for the excerpt. Click **[Next]**.



Output Setting	Description
MPEG1 Ultra Compact	Smallest file size, lowest resolution, good for e-mail attachments

(VBR)(email)	
MPEG1 Compact (CBR)	File size reduced from standard, some loss of resolution
MPEG1 Standard (CBR)	Standard MPEG compression
MPEG1 VCD Compliant (VBR)	Standard VCD compression (Video Compact Disc)

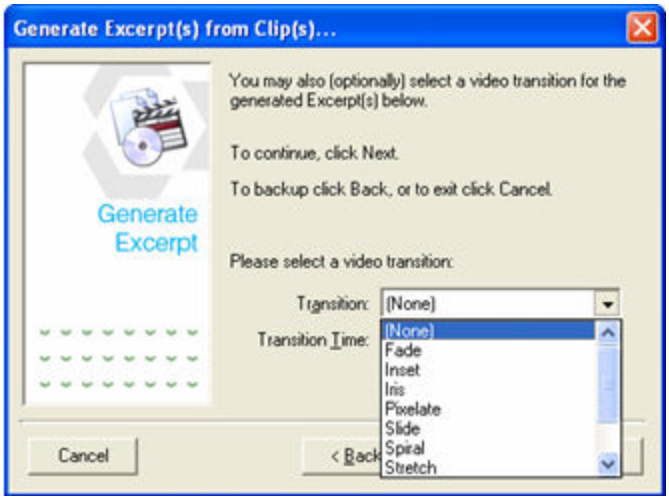
2. On the following screen, specify a transition effect for the excerpt, if desired. Click **[Next].**



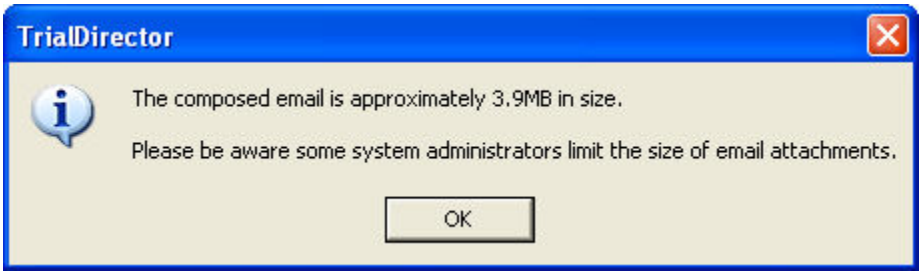
3. On the following screen, click **[Generate]** to generate the excerpts. When the excerpts have been generated, click **[OK]** to exit the wizard.

Email Recipient:

1. If you select the Email Recipient option, specify a transition effect for the excerpts, if desired. Click **[Next].**



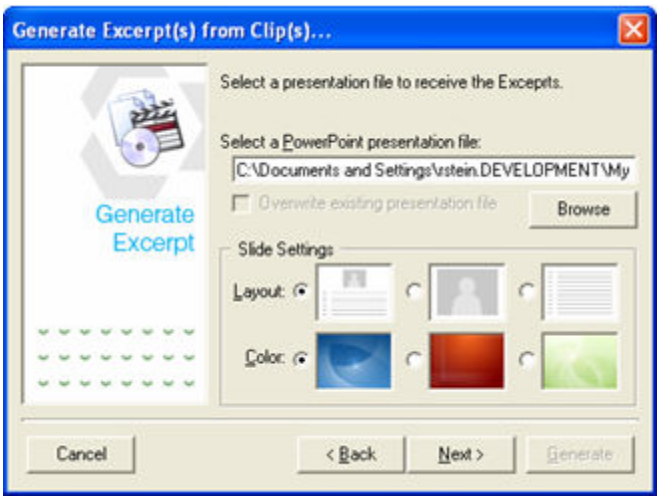
2. On the following screen, click **[Generate]** to generate the excerpts. When the excerpts have been generated, click **[OK]** to exit the wizard. A blank e-mail message with the excerpt files attached will be opened on your computer. If the excerpts are large files, you may see the message below.


TrialDirector
The composed email is approximately 3.9MB in size.
Please be aware some system administrators limit the size of email attachments.
OK

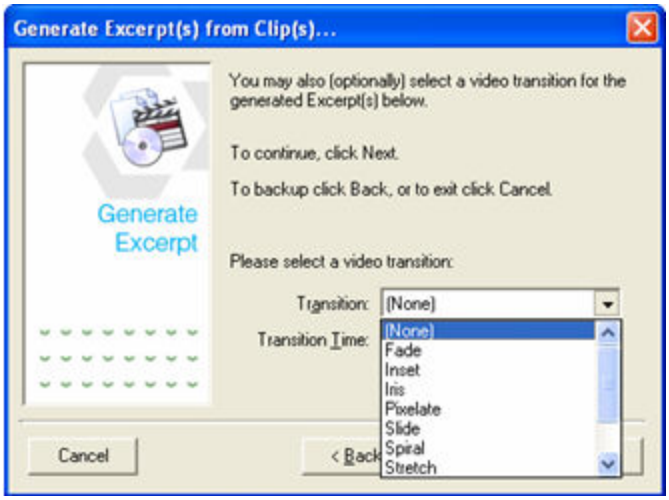
3. An e-mail message from your default e-mail application will be opened and will have the excerpt attached for mailing.

PowerPoint Presentation:

1. If you select the PowerPoint Presentation option, click the **[Browse]** button to select a path and filename for the excerpts, then specify the slide settings. Click **[Next]**.



2. On the following screen, specify a transition effect for the excerpts, if desired. Click **[Next].**



3. On the following screen, click **[Generate]** to generate the excerpts. When the excerpts have been generated, click **[OK]** to exit the wizard. A PowerPoint file containing the excerpts will be created on your computer.

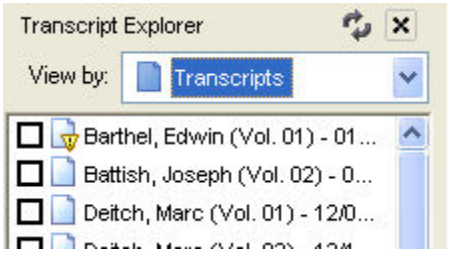
More Information:

- Digital Video Transcript
- Clips

Indexing Transcripts

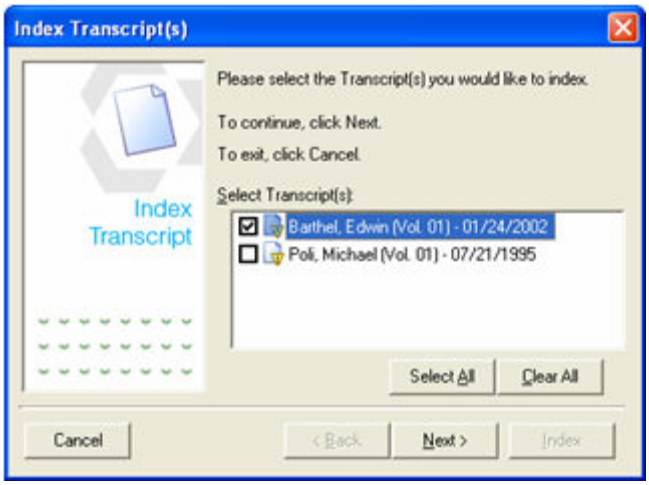
Transcript Manager allows you to index each of your transcripts in your cases. By indexing your transcripts, you will have a searchable list of each word (even exhibits) in your transcript. You can use the index to locate a word and then jump to the specific point in the transcript where the word appears.

When you add transcripts to TrialDirector, you are prompted to index the transcript. If you chose to defer indexing, the un-indexed transcript will be identified by a special icon with a yellow triangle in the corner.

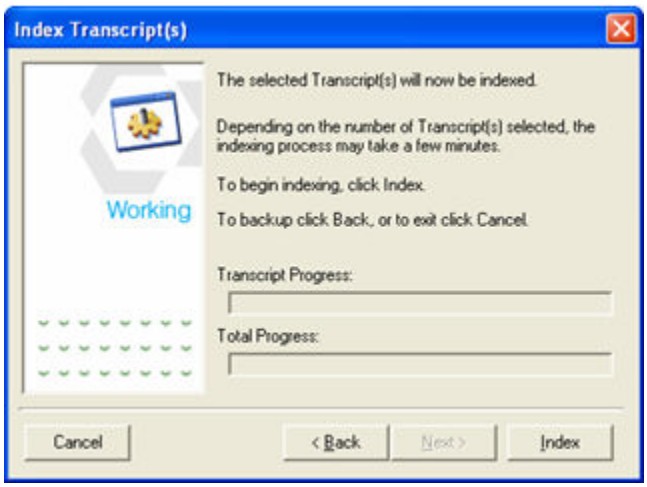


In order to index your transcripts,

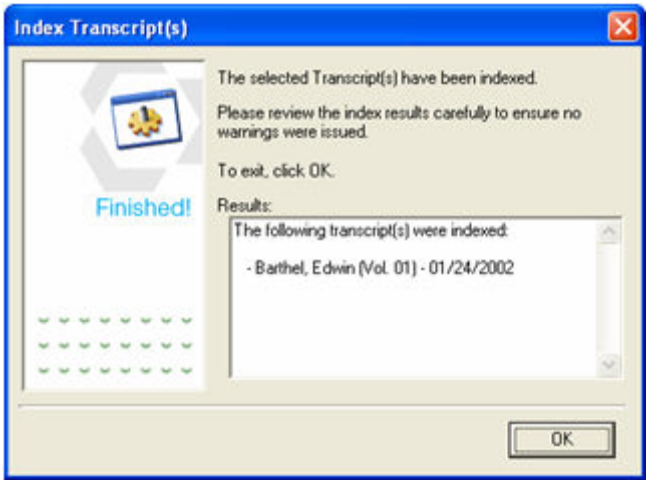
1. Select **Index Transcript(s)** from the Transcripts menu. A dialog window will allow you to select the transcript(s) you would like to index. When you have selected the transcript(s) you would like to index, click **[Next]**.



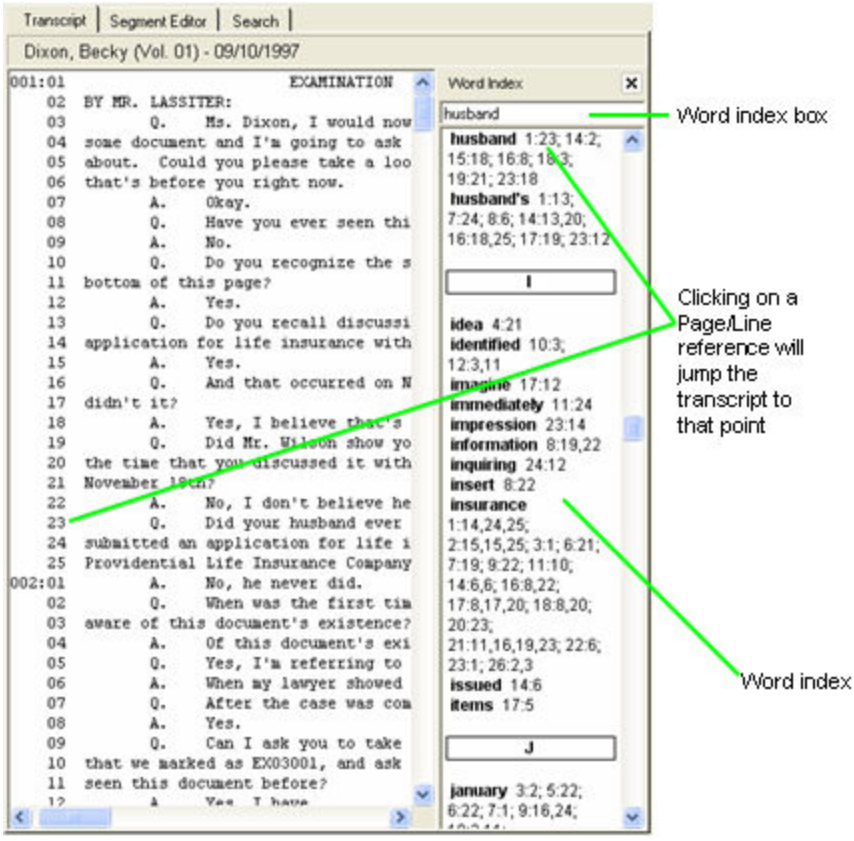
2. The next window will track the progress of the indexing. Click **[Index]** to begin the indexing process. There are two progress bars: one for the current transcript being indexed, and one for total progress. These two bars may display different progress points if you chose to index more than one transcript.


Index Transcript(s)
The selected Transcript(s) will now be indexed.
Depending on the number of Transcript(s) selected, the indexing process may take a few minutes.
To begin indexing, click Index.
To backup click Back, or to exit click Cancel.
Working
Transcript Progress:
Total Progress:
Cancel
< Back
Next >
Index

3. When all of the transcripts have been indexed, click **[Next]**.


Index Transcript(s)
The selected Transcript(s) have been indexed.
Please review the index results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The following transcript(s) were indexed:
- Barthel, Edwin (Vol. 01) - 01/24/2002
OK

4. Check this window to ensure no errors occurred. Click **[OK]** to exit.
5. To view the results of the indexing, select the Word Index command from the View menu. You will now see index information populated in the Word Index window to the right of the Transcript Window.



More Information:

- Digital Video Transcript
- Working with Transcripts

Import Transcripts

Topics:

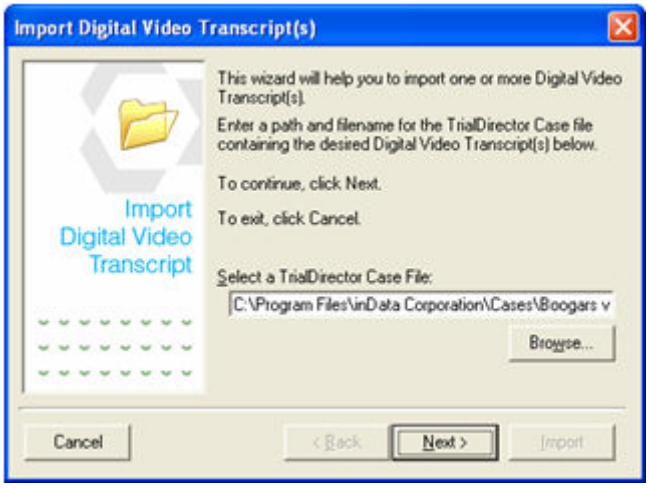
- Import a Transcript from a TrialDirector Case File
- Import Multiple TrialDirector Case Files
- Import an ASCII Transcript
- Import an AMICUS Transcript
- Import a Digital Video Transcript from inMotion DVT Media
- Import a Transcript from Portable Transcript Format

The Transcript Manager allows you to import transcripts from other cases, *.cms files, electronic transcripts, or from inMotion™ DVT media.

Import a Transcript from a TrialDirector Case File

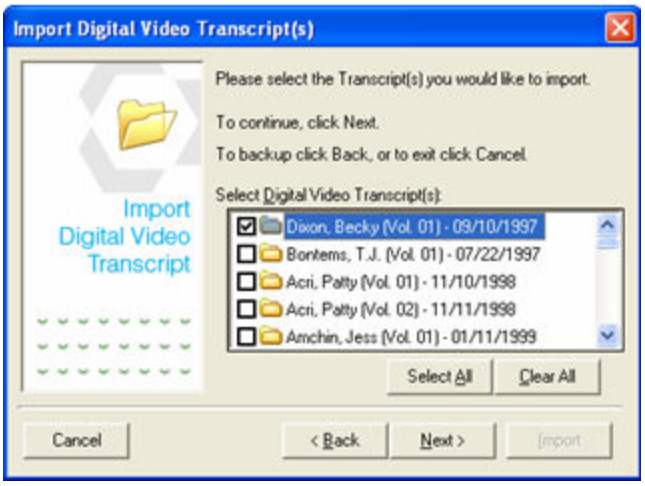
Follow these steps to import one or more Digital Video Transcripts from a case file:

1. Select **Import Transcript(s) from...| TrailDirector Case File (*.cms)** from the Transcripts menu.


Import Digital Video Transcript(s)
This wizard will help you to import one or more Digital Video Transcript(s).
Enter a path and filename for the TrialDirector Case file containing the desired Digital Video Transcript(s) below.
To continue, click Next.
To exit, click Cancel.
Import Digital Video Transcript
Select a TrialDirector Case File:
C:\Program Files\inData Corporation\Cases\Boogars v
Browse...
Cancel
< Back
Next >
Import

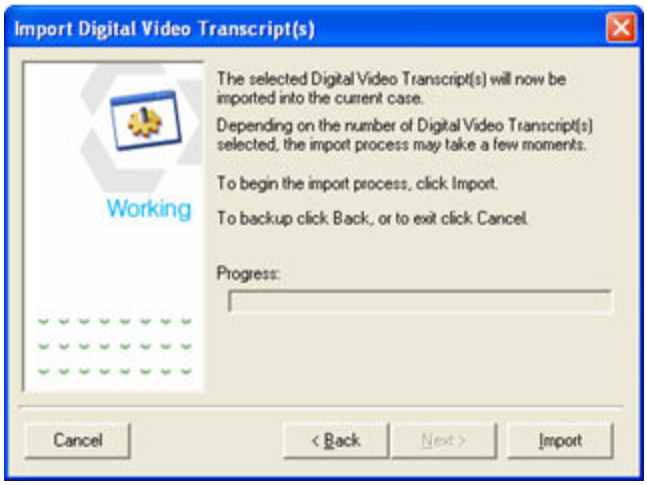
Note: *The *.cms file can reside on a local hard drive, floppy disk, CD/DVD-ROM, a network drive, or UNC path. The *.cms file is simply imported from the source into the current case.*

2. Click **[Browse]** to navigate to the desired Compound Media Storage (*.cms) file.
3. Select the desired *.cms file and click **[Open]** or double-click on the filename to return to the Import Digital Video Transcript(s) window.
4. When the correct path and filename is displayed, click **[Next]** to continue.


Import Digital Video Transcript(s)
Please select the Transcript(s) you would like to import.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Select Digital Video Transcript(s):
Import Digital Video Transcript
Dixon, Becky (Vol. 01) - 09/10/1997
Bontems, T.J. (Vol. 01) - 07/22/1997
Acri, Patty (Vol. 01) - 11/10/1998
Acri, Patty (Vol. 02) - 11/11/1998
Amchin, Jess (Vol. 01) - 01/11/1999
Select All
Clear All
Cancel
< Back
Next >
Import

Note: *Importing Digital Video Transcripts will preserve all clips, attached exhibit designations and annotations.*

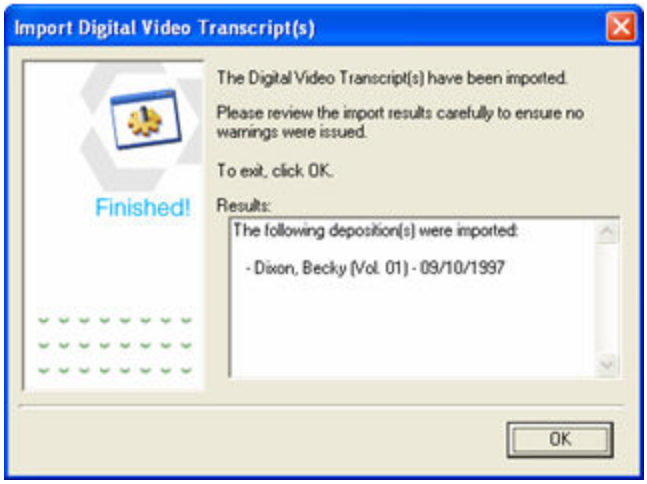
5. Select the Digital Video Transcript(s) you would like to import by clicking on the check box for the appropriate title(s). Click **[Select All]** to select all Digital Video Transcripts or **[Clear All]** to clear all selections.
6. When you have selected the desired Digital Video Transcript(s), click **[Next]** to continue.


Import Digital Video Transcript(s)
The selected Digital Video Transcript(s) will now be imported into the current case.
Depending on the number of Digital Video Transcript(s) selected, the import process may take a few moments.
To begin the import process, click Import.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Import

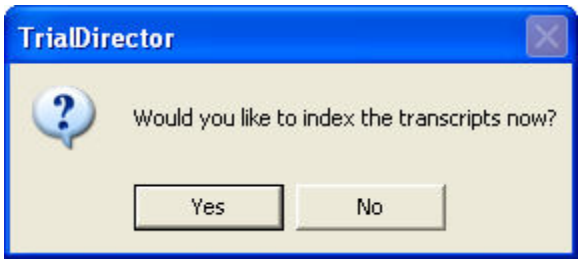
7. Click **[Import]** to begin importing the selected Digital Video Transcript(s). The import is complete when the progress bar reaches the end. Click **[Next]** to continue.

Note:*Authoring several Digital Video Transcripts to the same .CMS file (via Timecoder) allows for easy and efficient import of several DVT's at once.*

8. Click **[OK]** to complete the import process..


Import Digital Video Transcript(s)
The Digital Video Transcript(s) have been imported.
Please review the import results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The following deposition(s) were imported:
- Dixon, Becky (Vol. 01) - 09/10/1997
OK

9. TrialDirector will then prompt to index the transcript, as shown below. Indexing the transcript creates a searchable Word Index. Indexing also allows you to print reports and transcripts.



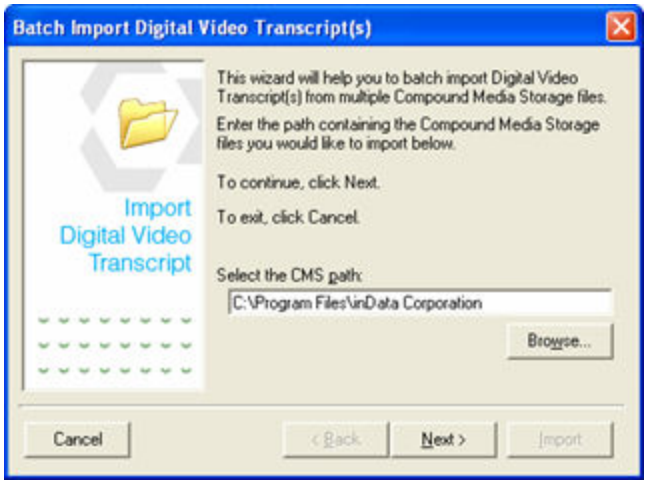
10. Click **[Yes]** to begin the Indexing process. Click **[No]** to return to the Transcript Manager without indexing the transcript(s).

Import From Multiple Case Files

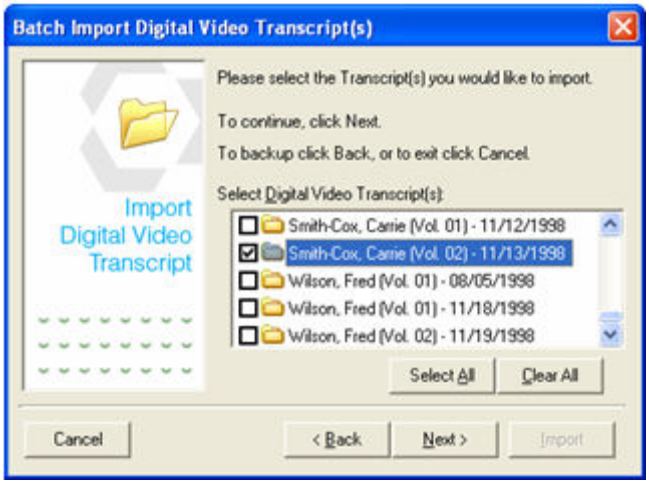
This feature is especially beneficial when receiving a *.cms file for each deponent volume from a service bureau.

Follow these steps to import a batch of *.cms files:

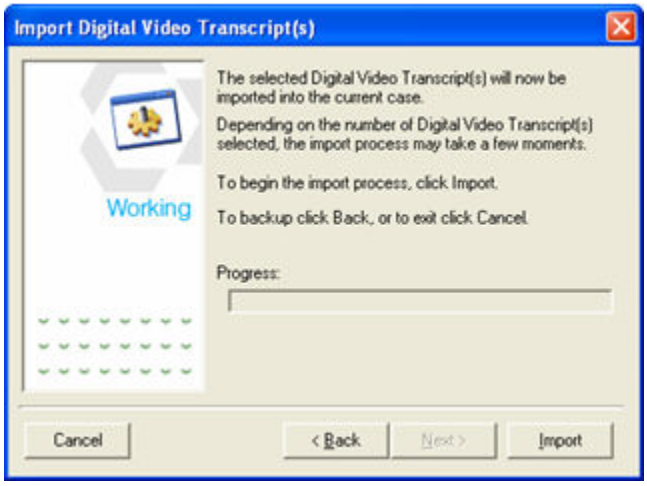
1. Select **ImportTranscript(s) from | Multiple TrialDirector Case Files (*.cms)** from the Transcript menu. The following screen will appear:


Batch Import Digital Video Transcript(s)
This wizard will help you to batch import Digital Video Transcript(s) from multiple Compound Media Storage files.
Enter the path containing the Compound Media Storage files you would like to import below.
To continue, click Next.
To exit, click Cancel.
Import Digital Video Transcript
Select the CMS path:
C:\Program Files\inData Corporation
Browse...
Cancel
< Back
Next >
Import

2. Enter the file path containing the *.cms files you wish to import or click the **[Browse]** button to select the path containing the *.cms files.
3. Click **[Next]** to continue. TrialDirector will queue any *.cms files within the path previously entered and list all of the associated deponent volumes. The following screen will appear:


Batch Import Digital Video Transcript(s)
Please select the Transcript(s) you would like to import.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Select Digital Video Transcript(s):
Import Digital Video Transcript
Smith-Cox, Carrie (Vol. 01) - 11/12/1998
Smith-Cox, Carrie (Vol. 02) - 11/13/1998
Wilson, Fred (Vol. 01) - 08/05/1998
Wilson, Fred (Vol. 01) - 11/18/1998
Wilson, Fred (Vol. 02) - 11/19/1998
Select All
Clear All
Cancel
< Back
Next >
Import

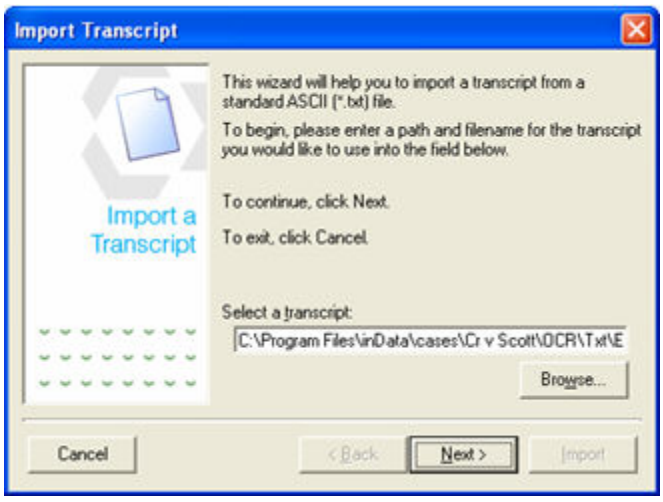
4. Select which deponent volumes you wish to import and click **[Next]** to continue. The following screen will appear:


Import Digital Video Transcript(s)
The selected Digital Video Transcript(s) will now be imported into the current case.
Depending on the number of Digital Video Transcript(s) selected, the import process may take a few moments.
To begin the import process, click Import.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Import

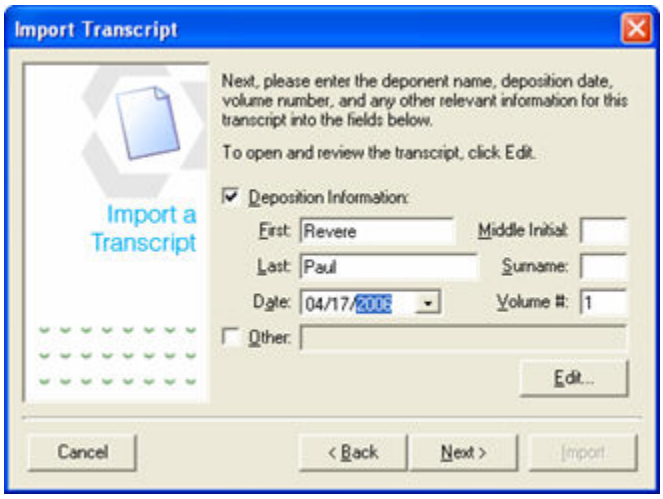
5. Click **[Import]** to begin the multiple *.cms file import process. Depending on the number of *.cms files selected, the process could take a few moments.
6. Once the progress meter reaches 100%, click **[Next]** to display the import results.
7. Review the import results and click **[OK]** to complete the process.
8. TrialDirector will then prompt to index the recently imported transcripts. Click **[Yes]** to import or **[No]** to index at a later time.

Import an ASCII Transcript

1. Select **ImportTranscript(s) from | ASCII Transcript (*.txt)** from the Transcripts menu.

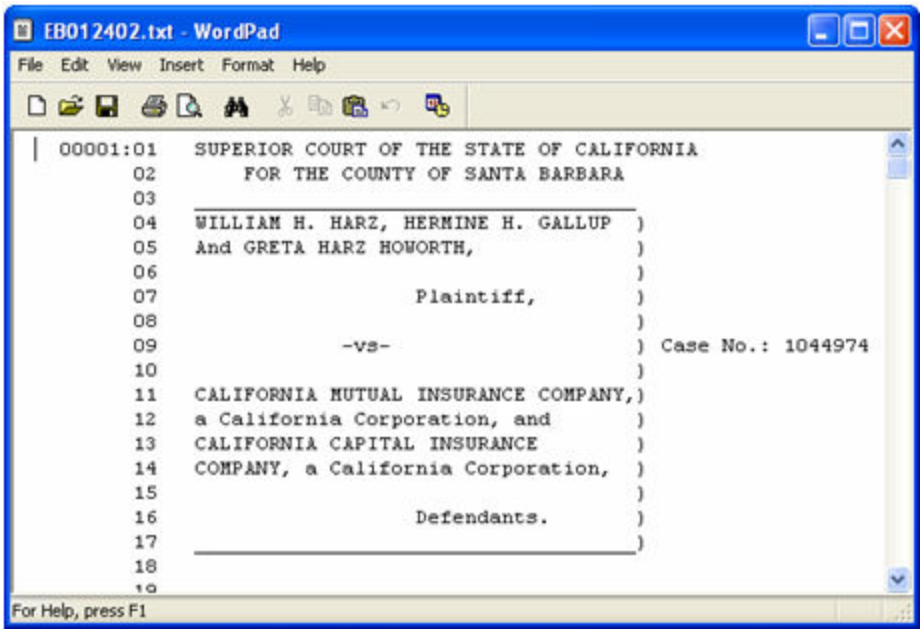

Import Transcript
This wizard will help you to import a transcript from a standard ASCII (*.txt) file.
To begin, please enter a path and filename for the transcript you would like to use into the field below.
To continue, click Next.
To exit, click Cancel.
Import a Transcript
Select a transcript:
C:\Program Files\inData\cases\Cr v Scott\OCR\Txt\E
Browse...
Cancel
< Back
Next >
Import

2. Click the **[Browse]** button to select the transcript you want to import. After you have selected a file or typed in a fully qualified path (including the drive letter), click **[Next]** to continue.



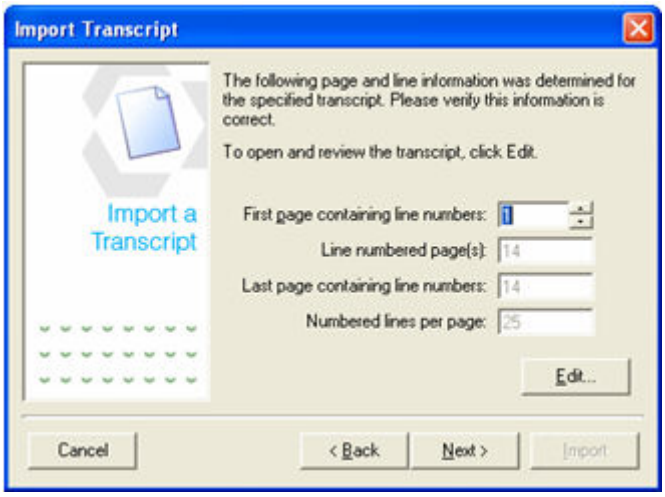
Note: *TrialDirector will attempt to read the deposition information contained within the source transcript file. If this information is available, it will automatically be populated.*

3. If the transcript information in the fields provided is blank or incorrect, you can edit the information. To view the transcript before continuing and gather transcript information, click **[Edit]**.


EB012402.txt - WordPad
File Edit View Insert Format Help
00001:01 SUPERIOR COURT OF THE STATE OF CALIFORNIA
02 FOR THE COUNTY OF SANTA BARBARA
04 WILLIAM H. HARZ, HERMINE H. GALLUP)
05 And GRETA HARZ HOWORTH,)
07 Plaintiff,)
09 -vs-) Case No.: 1044974
11 CALIFORNIA MUTUAL INSURANCE COMPANY,)
12 a California Corporation, and)
13 CALIFORNIA CAPITAL INSURANCE)
14 COMPANY, a California Corporation,)
16 Defendants.)
For Help, press F1

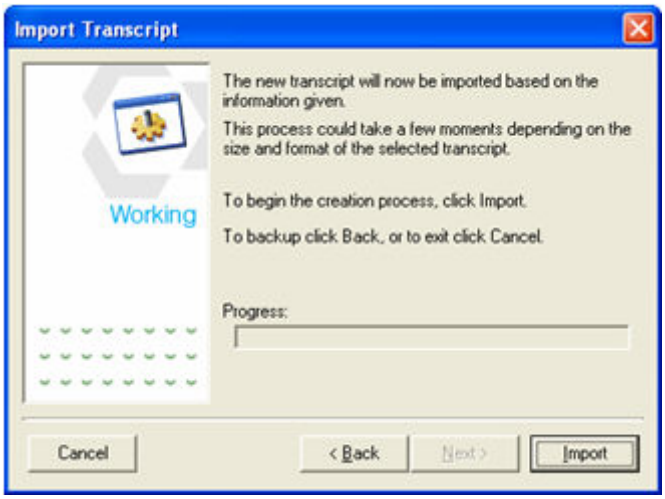
Note: *By default, TrialDirector will preview the transcript in WordPad. However, opening the file within Notepad can reveal special formatting characters within the transcript.*

4. When the deposition information is complete, click **[Next]** to continue. TrialDirector automatically tries to determine the page and line information for the selected transcript. This window allows you to verify that information.

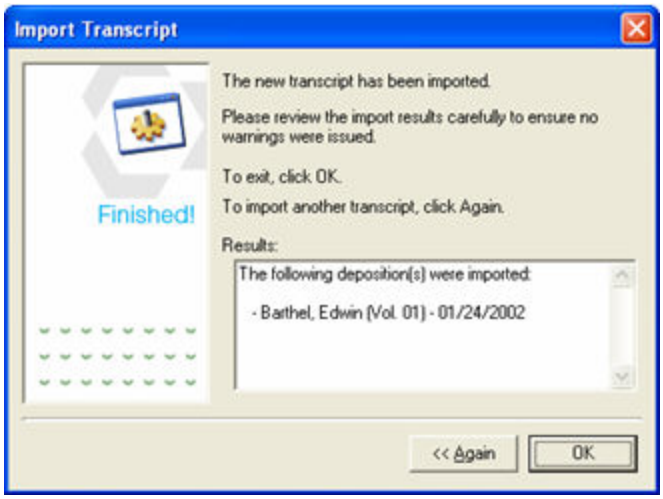

Import Transcript
The following page and line information was determined for the specified transcript. Please verify this information is correct.
To open and review the transcript, click Edit.
Import a Transcript
First page containing line numbers: 1
Line numbered page(s): 14
Last page containing line numbers: 14
Numbered lines per page: 25
Edit...
Cancel
< Back
Next >
Import

Note: Page and Line Information: *Note that TrialDirector is detecting the first page containing line numbers, not the absolute first page of the transcript. For example, the title page of a transcript may not contain line numbers. In that instance, TrialDirector would detect the first page containing line numbers as Page 2. The page numbers of the imported transcript are designed to be consistent with the original.*

5. Click **[Edit]** to view the transcript, if necessary, as described above. When the information is correct, click **[Next]** to continue.

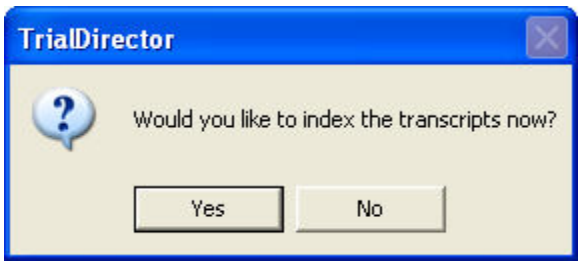

Import Transcript
Working
The new transcript will now be imported based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
To begin the creation process, click Import.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Import

6. Click **[Import]** to begin importing the transcript. If any of the deposition information is missing, the IMPORT button will not be available. Click the **[Back]** button twice to return to the deposition information page and enter the appropriate information.
7. When the progress bar reaches the end, click **[Next]** to continue.


Import Transcript
Finished!
The new transcript has been imported.
Please review the import results carefully to ensure no warnings were issued.
To exit, click OK.
To import another transcript, click Again.
Results:
The following deposition(s) were imported:
- Barthel, Edwin (Vol. 01) - 01/24/2002
<< Again
OK

Note: *Click the Again button to import another transcript file.*

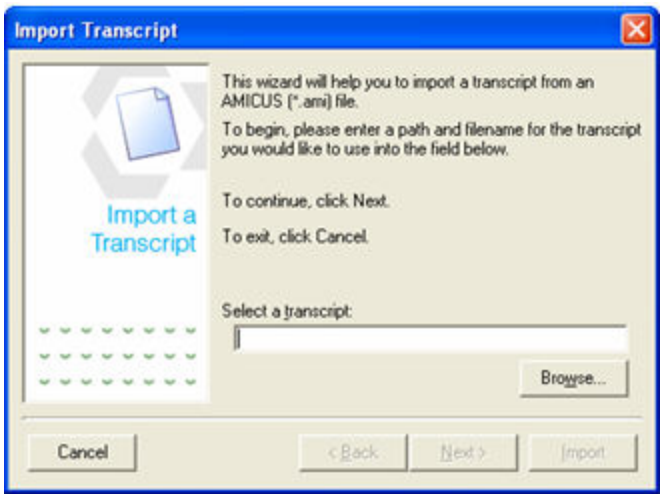
8. Review the import results to ensure no warnings were issued. Click **[OK]** to return to complete the import process.
9. TrialDirector will then prompt to index the transcript, as show below. Indexing the transcript creates a searchable Word Index. Also, indexing will allow you to print reports and transcripts.



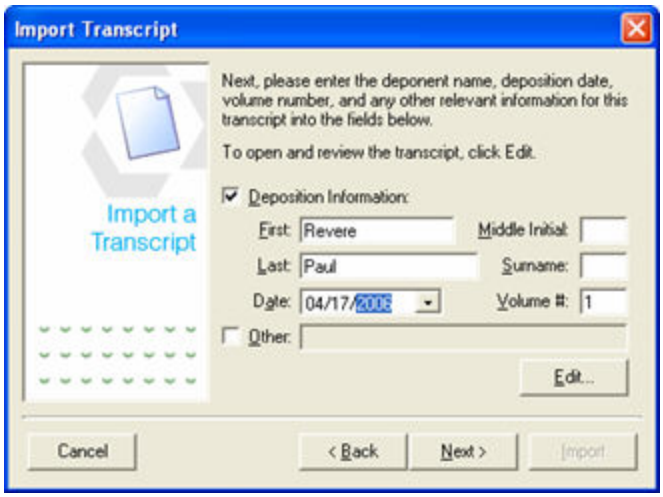
10. Click **[Yes]** to begin the Indexing process. Click **[No]** to return to the Transcript Manager.

Import an AMICUS Transcript

1. Select **ImportTranscript(s) from | AMICUS Transcript (*.ami)** from the Transcript menu.

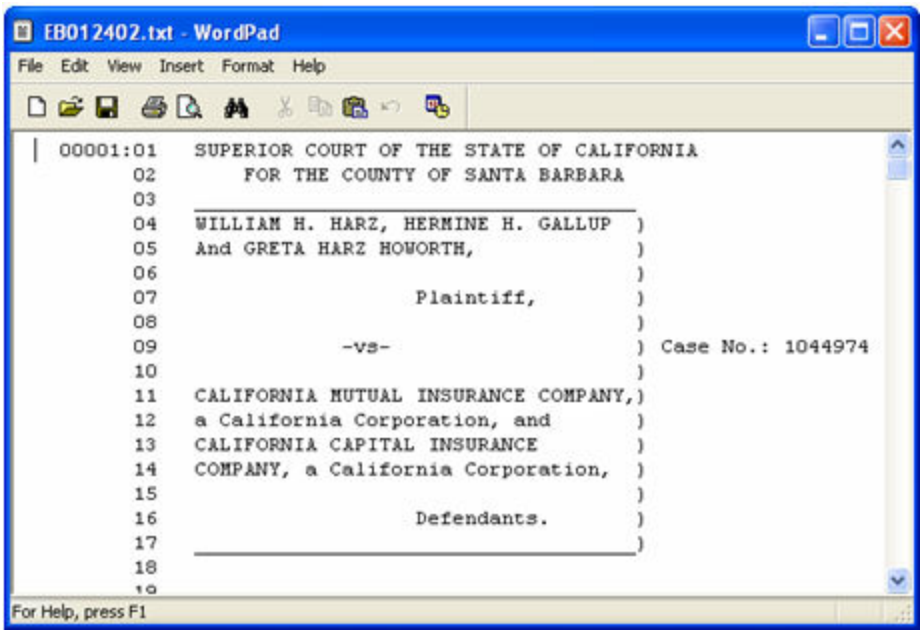

Import Transcript
This wizard will help you to import a transcript from an AMICUS (*.ami) file.
To begin, please enter a path and filename for the transcript you would like to use into the field below.
To continue, click Next.
To exit, click Cancel.
Import a Transcript
Select a transcript:
Browse...
Cancel
< Back
Next >
Import

2. Click the **[Browse]** button to select the transcript you want to import. After you have selected a file or typed in a fully qualified path (including the drive letter), click **[Next]** to continue.



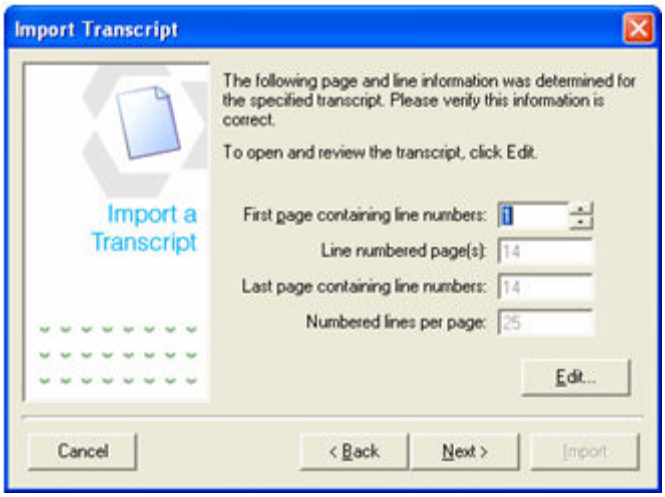
Note: *TrialDirector will attempt to read the deposition information contained within the source transcript file. If this information is available, it will automatically be populated.*

3. If the transcript information in the fields provided is blank or incorrect, you can edit the information. To view the transcript before continuing and gather transcript information, click **[Edit]**.


EB012402.txt - WordPad
File Edit View Insert Format Help
00001:01 SUPERIOR COURT OF THE STATE OF CALIFORNIA
02 FOR THE COUNTY OF SANTA BARBARA
03
04 WILLIAM H. HARZ, HERMINE H. GALLUP)
05 And GRETA HARZ HOWORTH,)
06)
07 Plaintiff,)
08)
09 -vs-) Case No.: 1044974
10)
11 CALIFORNIA MUTUAL INSURANCE COMPANY,)
12 a California Corporation, and)
13 CALIFORNIA CAPITAL INSURANCE)
14 COMPANY, a California Corporation,)
15)
16 Defendants.)
17)
18
For Help, press F1

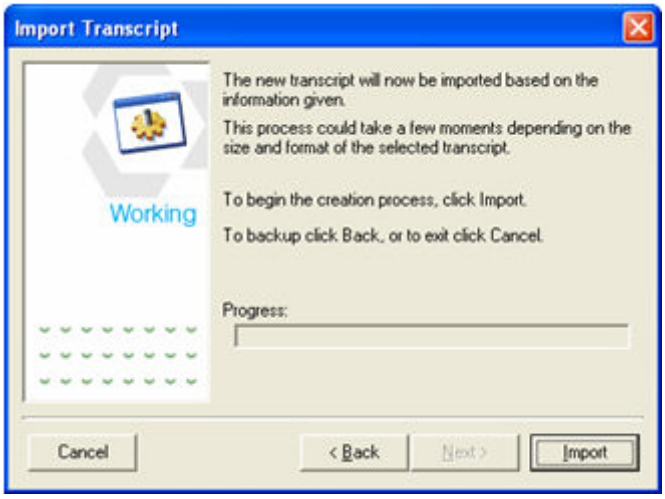
Note: *By default, TrialDirector will preview the transcript in WordPad. However, opening the file within Notepad can reveal special formatting characters within the transcript.*

4. When the deposition information is complete, click **[Next]** to continue. TrialDirector automatically tries to determine the page and line information for the selected transcript. This window allows you to verify that information.

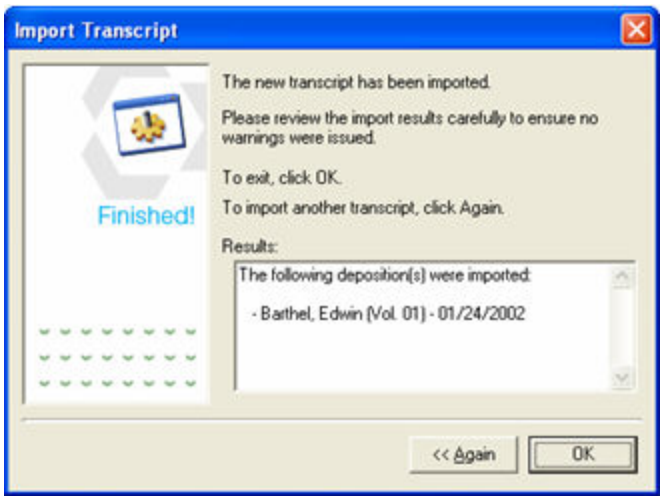

Import Transcript
The following page and line information was determined for the specified transcript. Please verify this information is correct.
To open and review the transcript, click Edit.
Import a Transcript
First page containing line numbers: 1
Line numbered page(s): 14
Last page containing line numbers: 14
Numbered lines per page: 25
Edit...
Cancel
< Back
Next >
Import

Note: Page and Line Information: *Note that TrialDirector is detecting the first page containing line numbers, not the absolute first page of the transcript. For example, the title page of a transcript may not contain line numbers. In that instance, TrialDirector would detect the first page containing line numbers as Page 2. The page numbers of the imported transcript are designed to be consistent with the original.*

5. Click **[Edit]** to view the transcript, if necessary, as described above. When the information is correct, click **[Next]** to continue.

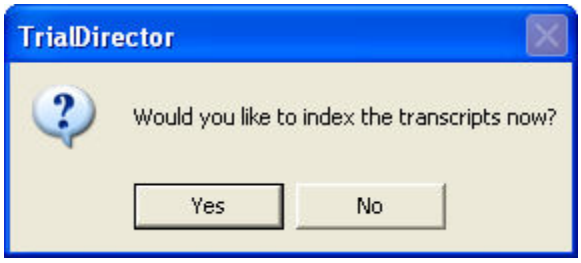

Import Transcript
The new transcript will now be imported based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Import.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Import

6. Click **[Import]** to begin importing the transcript. If any of the deposition information is missing, the IMPORT button will not be available. Click the **[Back]** button twice to return to the deposition information page and enter the appropriate information.
7. When the progress bar reaches the end, click **[Next]** to continue.


Import Transcript
The new transcript has been imported.
Please review the import results carefully to ensure no warnings were issued.
To exit, click OK.
To import another transcript, click Again.
Finished!
Results:
The following deposition(s) were imported:
- Barthel, Edwin (Vol. 01) - 01/24/2002
<< Again
OK

Note: *Click the* ***Again*** *button to import another transcript file.*

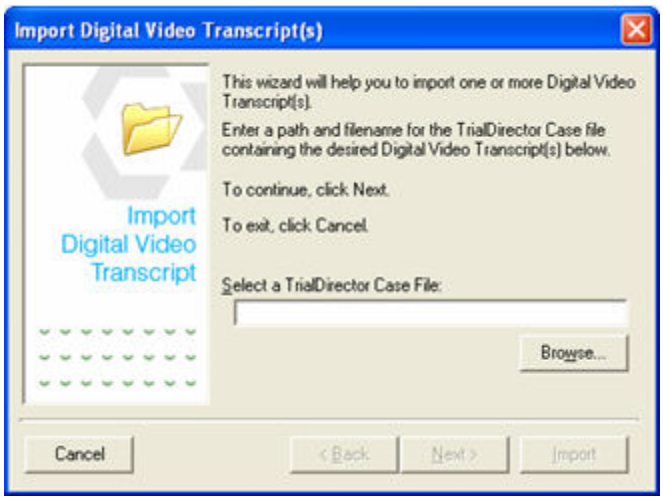
8. Review the import results to ensure no warnings were issued. Click **[OK]** to return to complete the import process.
9. TrialDirector will then prompt to index the transcript, as show below. Indexing the transcript creates a searchable Word Index. Also, indexing will allow you to print reports and transcripts.



10. Click **[Yes]** to begin the Indexing process. Click **[No]** to return to the Transcript Manager.

Import a Digital Video Transcript from inMotion DVT Media

1. To import a Digital Video Transcript from inMotion DVT media, select **Import Transcript(s) from...| inMotion DVT Media** from the Transcripts menu.

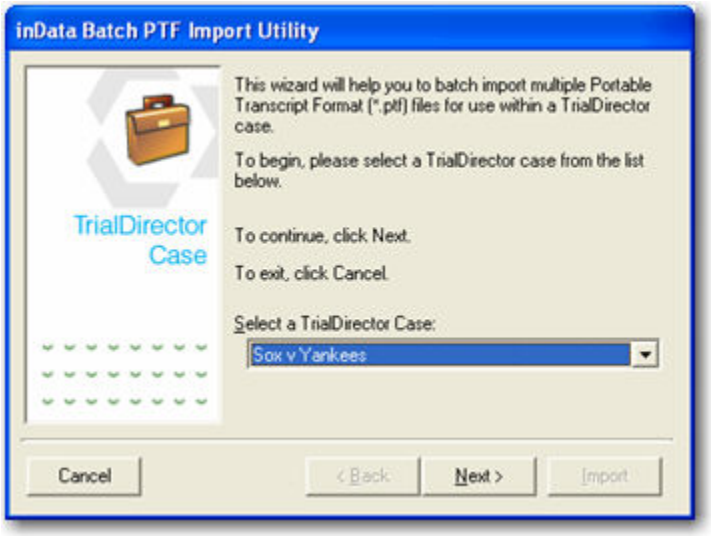

Import Digital Video Transcript(s)
This wizard will help you to import one or more Digital Video Transcript(s).
Enter a path and filename for the TrialDirector Case file containing the desired Digital Video Transcript(s) below.
To continue, click Next.
To exit, click Cancel.
Import Digital Video Transcript
Select a TrialDirector Case File:
Browse...
Cancel
< Back
Next >
Import

2. Click **[Next]** to continue and then skip to step two under **Importing a Digital Video Transcript from a TrialDirector Case File** to finish importing the Digital Video Transcript(s).

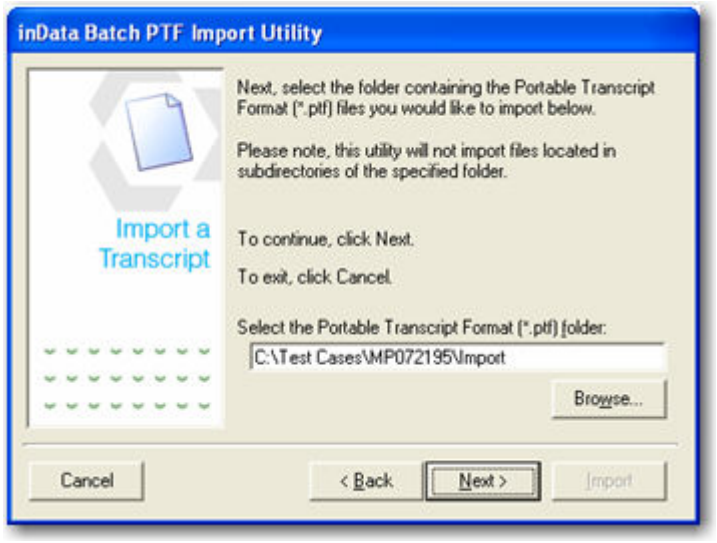
Import Portable Transcript Format (PTF) Files

You can import Portable Transcript Format (PTF) files as a batch or as single files. PTF originates from LiveNote, and this simple process only imports the transcript, not associated video. Use TimeCoder Pro as an import tool when associated video is required.

1. From the Tools menu, select **Batch PTF Import Tool...** The Import Utility dialog opens. Select the case to which the files will be added, then click **Next**.


inData Batch PTF Import Utility
This wizard will help you to batch import multiple Portable Transcript Format (*.ptf) files for use within a TrialDirector case.
To begin, please select a TrialDirector case from the list below.
To continue, click Next.
To exit, click Cancel.
TrialDirector Case
Select a TrialDirector Case:
Sox v Yankees
Cancel
< Back
Next >
Import

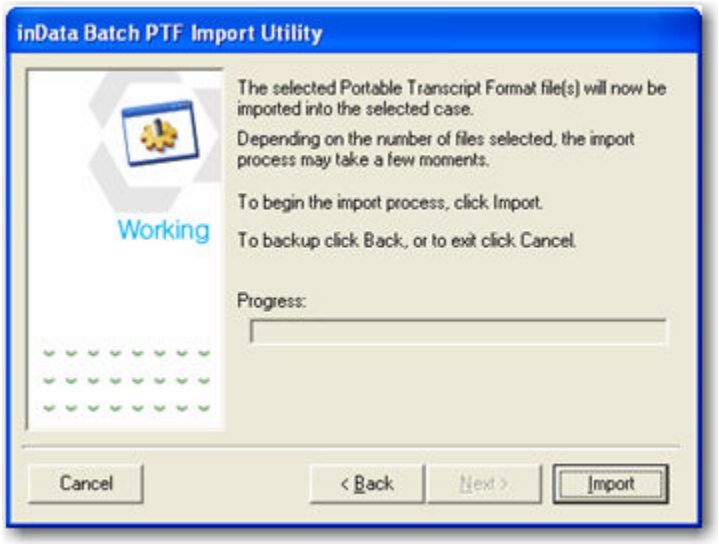
2. Enter or browse to the location where the desired PTF files are located. Click **Next**.


inData Batch PTF Import Utility
Import a Transcript
Next, select the folder containing the Portable Transcript Format (*.ptf) files you would like to import below.
Please note, this utility will not import files located in subdirectories of the specified folder.
To continue, click Next.
To exit, click Cancel.
Select the Portable Transcript Format (*.ptf) folder:
C:\Test Cases\MP072195\Import
Browse...
Cancel
< Back
Next >
Import

3. A list of all PTF files in the select folder is displayed on the next dialog screen. Select the desired transcripts from the list, then click **Next**.

inData Batch PTF Import Utility
Import a Transcript
Finally, please select the transcripts you would like to import from the list below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Select Digital Video Transcript(s):
Poli, Michael (Vol. 01) - 07/21/1995
Select All
Clear All
Cancel
< Back
Next >
Import

4. Click **Import** on the next dialog box to begin the import process. The import progress will display on the progress bar, however, for small imports this may pass too quickly to notice. Click **OK** on the results screen to exit the Import Utility.


inData Batch PTF Import Utility
The selected Portable Transcript Format file(s) will now be imported into the selected case.
Depending on the number of files selected, the import process may take a few moments.
To begin the import process, click Import.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Import

More Information:

- Digital Video Transcript
- Import a Digital Video Transcript
- Open a Digital Video Transcript
- View a Digital Video Transcript
- Change Digital Video Transcript Properties
- Close a Digital Video Transcript
- Remove Digital Video Transcripts

Search a Transcript

The search tools allow you to search for text/phrases, questions and answers, page and lines, or timecodes in the transcript. This allows you to find the portions of the transcript you want to include in your clips. You can also search for Beginning of Deposition Video markers.

There are three methods of searching:

- The Find Tool
- The Search Tab
- Clipboard Linking

Search Using the Find Tool

Topics:

- Search for Text or a Phrase
- Search for Question/Answer
- Search for a Page or Line
- Search for a Timecode
- Search for a Deposition Video Marker
- Use the Find Next Command

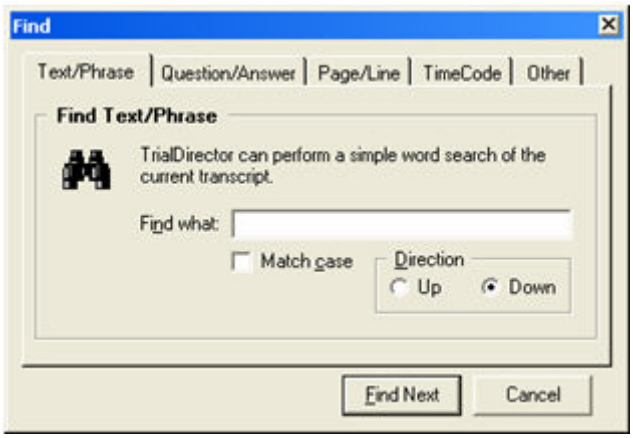
The Find tool is an internal search tool that allows you to search for specific text/phrases, questions and answers, page and lines, timecodes, or beginning of deposition video markers in the transcript.

Note: *To expedite the search process, disconnect the multimedia. If the multimedia is connected during searches, it will attempt seek to the point of each hit in the transcript, and you may have to change CD's each time.*

Find Text/Phrase

The Text/Phrase tab allows you to search for specific text in the transcript.

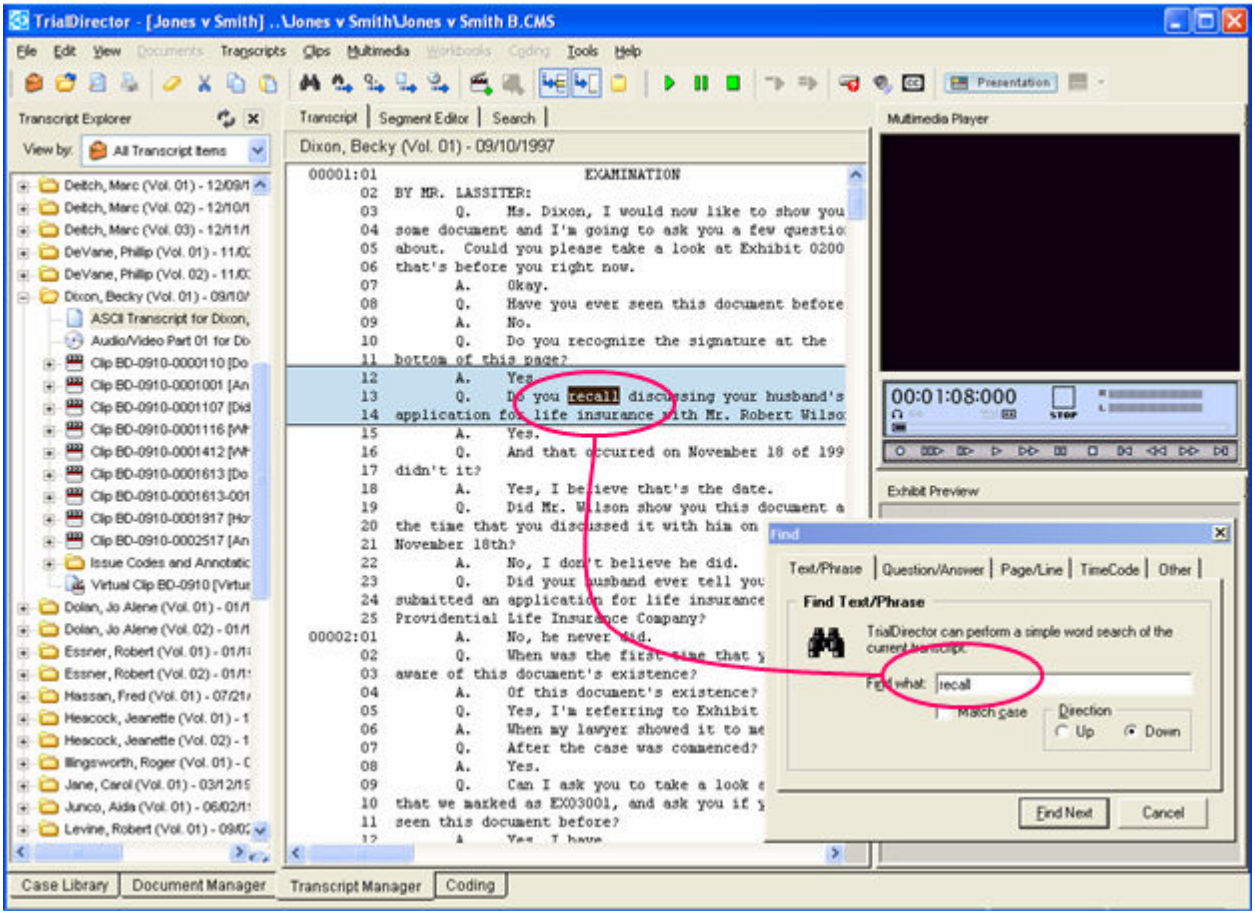
1. To find text or a phrase, do one of the following:
   - Click the **Find** button on the Toolbar.
   - Select **Find** from the Edit menu.



2. Enter the text or phrase you want to find in the **Find What** field.

Note: *TrialDirector will only find text that exists within a single line of the transcript. Split or hyphenated words are not found.*

3. Select the **Match Case** option if you would like the search to be case sensitive.
4. Select whether you want to search Up or Down from the current position of the cursor in the transcript.
5. Click **[Find Next]** to begin the search. The text in the Transcript Window moves to display the first occurrence of the search text as shown in the figure below.

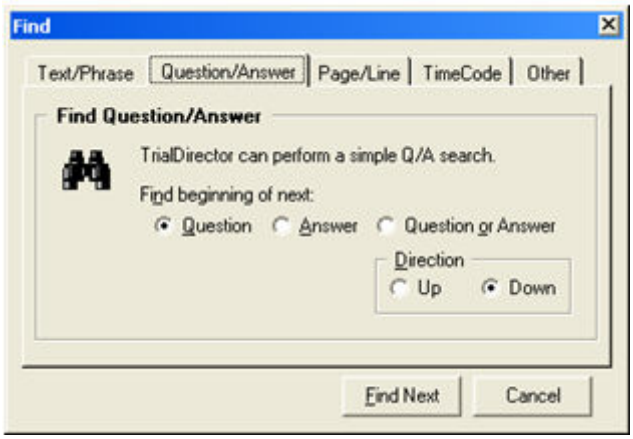

TrialDirector - [Jones v Smith] ..\Jones v Smith\Jones v Smith B.CMS
File Edit View Documents Transcripts Clips Multimedia Workbooks Coding Tools Help
Transcript Explorer
View by: All Transcript Items
Transcript | Segment Editor | Search
Dixon, Becky (Vol. 01) - 09/10/1997
EXAMINATION
BY MR. LASSITER:
Q. Ms. Dixon, I would now like to show you some document and I'm going to ask you a few questio about. Could you please take a look at Exhibit 0200 that's before you right now.
A. Okay.
Q. Have you ever seen this document before
A. No.
Q. Do you recognize the signature at the bottom of this page?
A. Yes.
Q. Do you recall discussing your husband's application for life insurance with Mr. Robert Wilso
A. Yes.
Q. And that occurred on November 18 of 199 didn't it?
A. Yes, I believe that's the date.
Q. Did Mr. Wilson show you this document a the time that you discussed it with him on November 18th?
A. No, I don't believe he did.
Q. Did your husband ever tell you submitted an application for life insurance Providential Life Insurance Company?
A. No, he never did.
Q. When was the first time that y aware of this document's existence?
A. Of this document's existence?
Q. Yes, I'm referring to Exhibit
A. When my lawyer showed it to me
Q. After the case was commenced?
A. Yes.
Q. Can I ask you to take a look a that we marked as EX03001, and ask you if y seen this document before?
Multimedia Player
00:01:08:000
Exhibit Preview
Find
Text/Phrase | Question/Answer | Page/Line | TimeCode | Other
Find Text/Phrase
TrialDirector can perform a simple word search of the current transcript.
Find what: recall
Match case
Direction
Up Down
Find Next
Cancel
Case Library | Document Manager | Transcript Manager | Coding

6. Click **[Find Next]** to move to the next occurrence of the search text.

Find Question/Answer

The Question/Answer tab allows you to search for the next question, the next answer, or the next occurrence of either.

1. To perform a question or answer search, do one of the following:
   - Click the **Question/Answer** tab on the Find window.
   - Select **Find Question/Answer** from the Edit menu if the Find dialog is not already open.

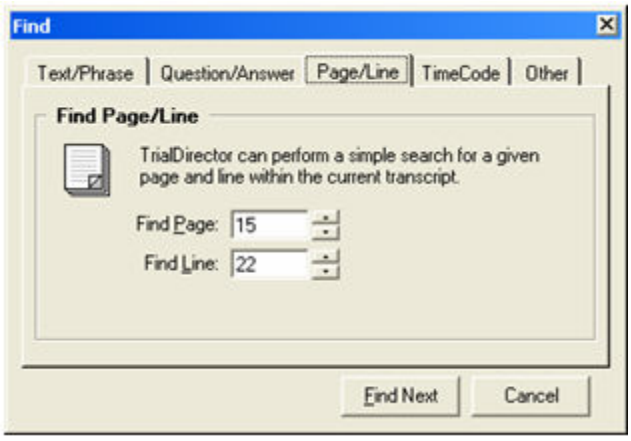


2. Select Question, Answer, or Question or Answer.
3. Select whether you want to search **Up** or **Down** from the current position of the cursor in the transcript. Down is the default position of the search.
4. Click **[Find Next]** to find the next occurrence of a question or answer.

Find Page/Line

The Page/Line tab allows you search for a particular page and line in the transcript.

1. To search for a page and line, do one of the following:
   - Click the **Page/Line** tab on the Find window.
   - Select **Find Page/Line** from the Edit menu if the Find dialog is not already open.



2. Do one of the following:

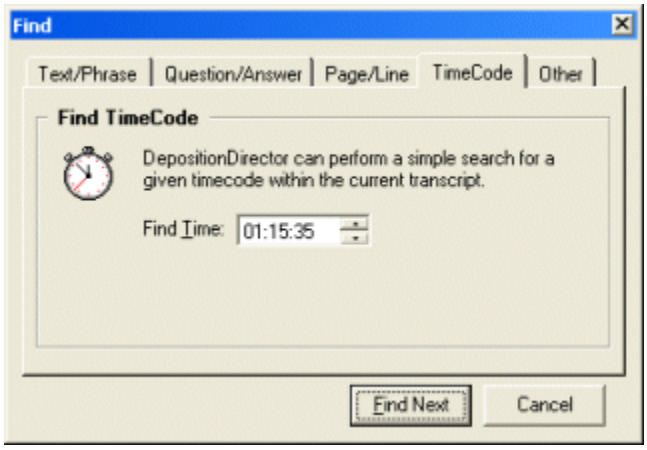
   - Enter the desired page and line number.
   - Use the up and down arrows buttons to increase or decrease the current page and line number selection.

3. Click **[Find Next]** to jump to the selected location in the transcript.

Find a Timecode

The TimeCode tab allows you to seek to a particular time in the Digital Video Transcript.

1. To search for a timecode, do one of the following:
   - Click the **TimeCode** tab on the Find window.
   - Select **Find Time** from the Edit menu if the Find dialog is not already open.



Note: *Users can search across multiple multimedia reference files, using the total elapsed time of the Digital Video Transcript.*

The time is expressed in Hours:Minutes:Seconds (HH:MM:SS).

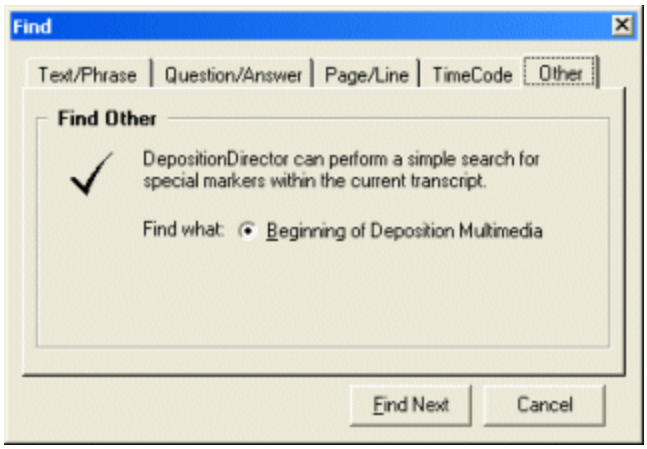
2. Do one of the following:
   - Enter the desired time.
   - Use the up and down arrow buttons to increase or decrease the current time selection.
3. Click **[Find Next]** to jump to the selected time in the Digital Video Transcript.

Note: *This operation requires the transcript be time stamped. If it has not been time stamped, this option will not work.*

Other

The Other tab allows you to search for Beginning of Deposition Video Markers. Beginning of Deposition Video markers are markers in the transcript that are embedded with a change of media during a deposition or hearing. For example, if a deposition takes an entire day, typically four videotapes will be utilized. At the change of videotape, a marker will be embedded in the transcript to reflect the change. This marker is the Beginning of Deposition Video marker.

1. To search for a marker, click the **Other** tab in the Find window.



2. Make sure the *Display Multimedia Markers* option (under the Transcript menu) is enabled prior to using this particular search type.
3. Click **[Find Next]** to find the next marker.

Use the Find Next Command

The **Find Next** command allows you to find the next occurrence of the most recently defined search criteria.

To find the next search item, do one of the following:

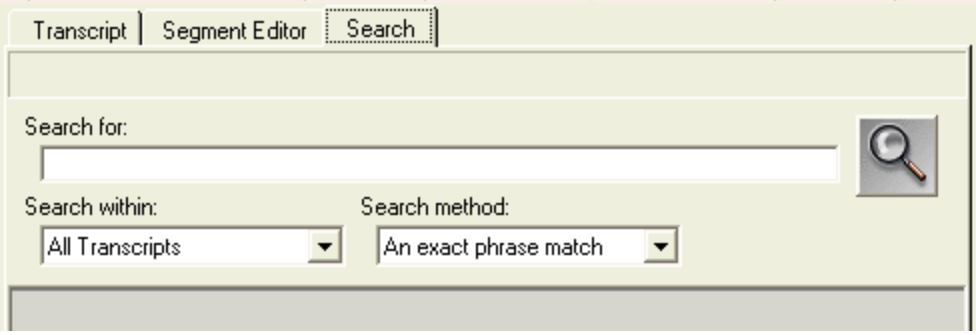
- Click the **[Find Next]** button on the Toolbar.
- Select **Find Next** from the Edit menu.

If you have not already performed a search during your current TrialDirector session, the **Find Next** command will bring up the Find dialog.

Using Search Tab

The Search tab in the Transcript window can be used to perform advanced searches on text in the open transcript, selected transcripts, or all transcripts. TrialDirector can search for multiple keywords across dozens of transcripts in just a couple of seconds.

1. To begin an advanced search, click on the **Search** tab located at the bottom of the Transcript window, as shown below.



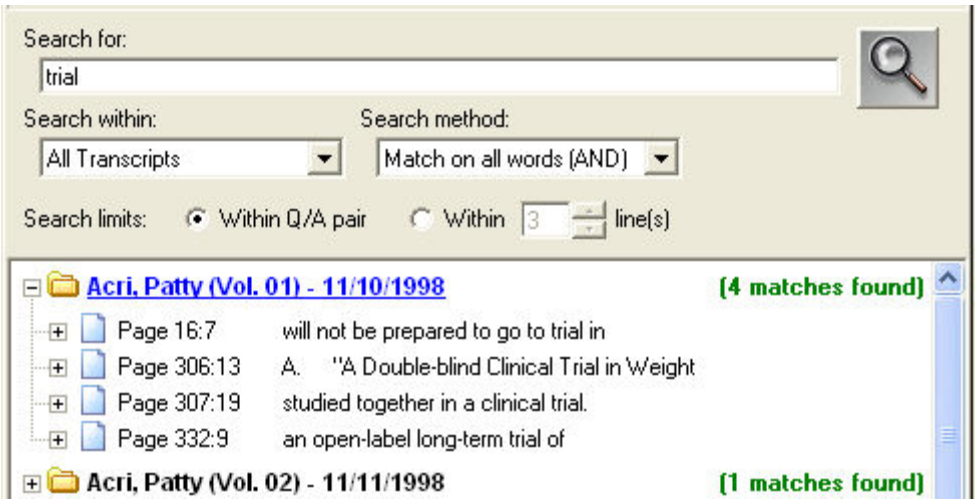
2. Enter the text you want to find in the **Search For** field.

Note: *There is no need to insert the word "and" or "or" between the words. These search operators will be selected in the Search Method field.*

3. In the Search Within field, choose one of the following:
   - **All Transcripts** to search all transcripts within the case.
   - **Selected Transcripts** to search the transcripts selected on the Transcripts Explorer (indicated by a checkmark).
   - **Current Transcript Only** to search the open transcript.
4. In the Search Method field, choose one of the following:
   - **An Exact Phrase Match** to find all search text in the exact order.
   - **Match On All Words (AND)** to find all text in any order.
   - **Match On Any Word (OR)** to find all occurrences of any text.
5. If you selected **Match On All Words (AND)**, select one of the following:
   - **Within A Q/A Pair** to find all text within one question and answer pair.
   - **Within "*x*" Lines** to find all text within a certain number of lines. If you select this option, enter the maximum number of lines or use the small arrow buttons to increase or decrease the maximum number of lines.
6. Click the magnifying glass. TrialDirector will search through the selected transcript(s) and display a list of hits for each transcript.

Transcript
Segment Editor
Search
Search for:
trial
Search within:
All Transcripts
Search method:
An exact phrase match
Acri, Patty (Vol. 01) - 11/10/1998 [4 matches found]
Acri, Patty (Vol. 02) - 11/11/1998 [1 matches found]
Amchin, Jess (Vol. 01) - 01/11/1999 [2 matches found]
Ashby, Audry (Vol. 01) - 03/08/1999 [2 matches found]

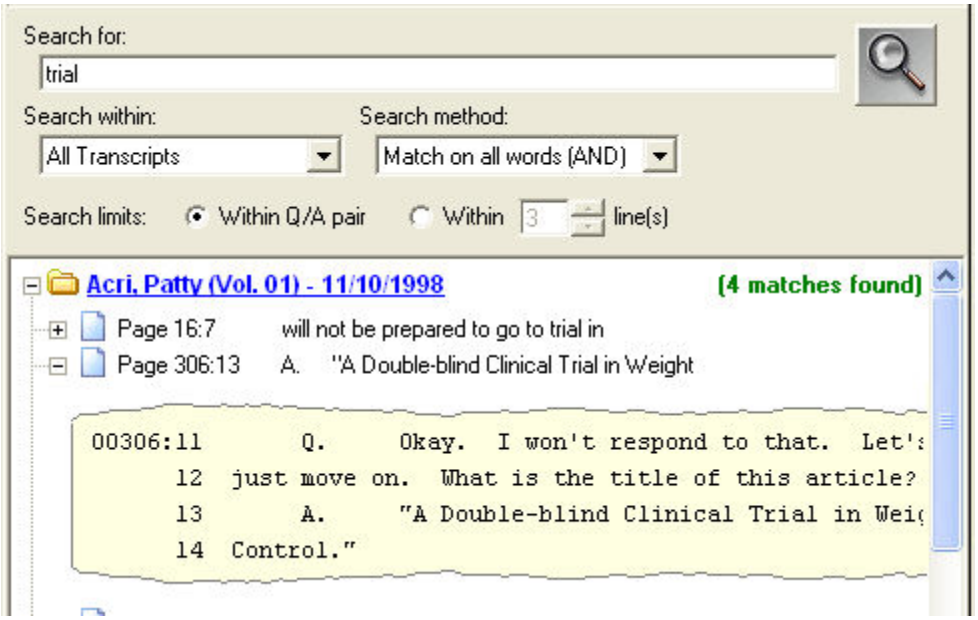
7. To view the hit details, click on the plus **[+]** sign next to the transcript name, as shown below.



Note: *Clicking on the hyperlink for each search result will automatically jump to that point within the related transcript, synchronizing the video to that location, as well.*

The hit details show the page and line number where the search hit is found, as well as the line of text that contains the search hit.

8. To view a "cut out" of the question and answer pair that contains the search hit, click on the plus **[+]** sign next to the page and line number, as shown below.



Note: *Using the Q/A Pair search method will reference the beginning Page:Line of the Q/A Pair. The Exact Phrase search method will reference the exact Page:Line of the search result.*

9. Search results are also hyperlinked to the transcripts. To follow a hyperlink, do one of the following:

- Single-click on the transcript name to jump to the selected transcript.
- Click on a specific search hit (page and line number) to jump directly to the part of the transcript that contains the search hit.

Your search results will remain on the search tab until you close the case.

Search Using Clipboard Linking

TrialDirector supports clipboard linking as a method of allowing other applications to find text, go to a particular page and line, open a Digital Video Transcript, or close a Digital Video Transcript. These features work from within any application simply by copying (or cutting) text to the clipboard. If the copied text matches a certain format, TrialDirector performs the requested action.

Note: *This option works well with other legal-specific applications, such as CT Summation iBlaze.*

As an example, follow these steps to use an e-mail message as the search engine.

1. If the Clipboard Monitor button is not already depressed, click the icon to activate clipboard linking. (It will look like this when activated:)
2. Open an e-mail message that contains a common search word, such as "exhibit".
3. Highlight EXHIBIT in the e-mail message.

4. Press **[Ctrl] + [C]** or click the Copy icon to copy the text to the Windows Clipboard. This automatically initiates a transcript search in TrialDirector.
5. If this is not the occurrence of "exhibit" that you are looking for, press **[Ctrl] + [C]** again (in the e-mail message) to search for the next occurrence.

Clipboard Linking Commands

The following table lists the commands available through clipboard linking:

Command	Description
Open a Digital Video Transcript	Copy the following text string to the clipboard:

	!(DESCRIPTION) Description being the name of the Digital Video Transcript to be opened. This does not have to be the entire Digital Video Transcript name. TrialDirector opens the first Digital Video Transcript that matches the typed description.
Close a Digital Video Transcript	Close the current Digital Video Transcript by copying the following text string to the clipboard: **!()**
Find Page/Line	With a Digital Video Transcript open, copy the following text string to the clipboard to find a specific page and line: **#(PAGE,LINE)** For example, copy #(10,15) to the clipboard to move to page 10, line 15.

More Information:

- Digital Video Transcript
- Transcript Text

Select Transcript Text

To select text, place the cursor over the beginning of the desired text, press and hold the left mouse button, drag the cursor to the end of the desired text.

Topics:

- Copy Selected Text to the Clipboard
- Select All Text
- Play Selected Text
- Add Selected Text to a Clip
- Clear Selected Text

Copy Selected Text to the Clipboard

To copy part of the transcript text to the clipboard, select the desired text and click the **[Copy]** button on the Toolbar or select **Copy** from the Edit menu, or press **[CTRL] + [C]** on your keyboard.

You can also right-click on the Transcript Window and select **Copy** from the shortcut menu.

Select All Text

To select all transcript text, choose Select All from the Edit menu or press **[CTRL] + [A]**.

Play Selected Text

Playing the selected transcript text allows you to quickly jump to and preview a specific portion of the Digital Video Transcript.

To play a text selection, highlight the desired text and select **Play Selected Text** from the Clips menu or right-click on the Transcript Window and select **Play Selected Text** from the shortcut menu.

Add Selected Text to a Clip

To add a text selection to the current clip, highlight the desired text and select **Add Selected Text To *YourClipName*** from the Clips menu or right-click on the Transcript Window and select **Add Selected Text To *YourClipName*** from the shortcut menu.

Clear Selected Text

To de-select all text selections, click the **[Clear]** button on the Toolbar or select **Clear** from the Edit menu.

More Information:

- Digital Video Transcript
- Transcript Text

Export a Transcript

Topics:

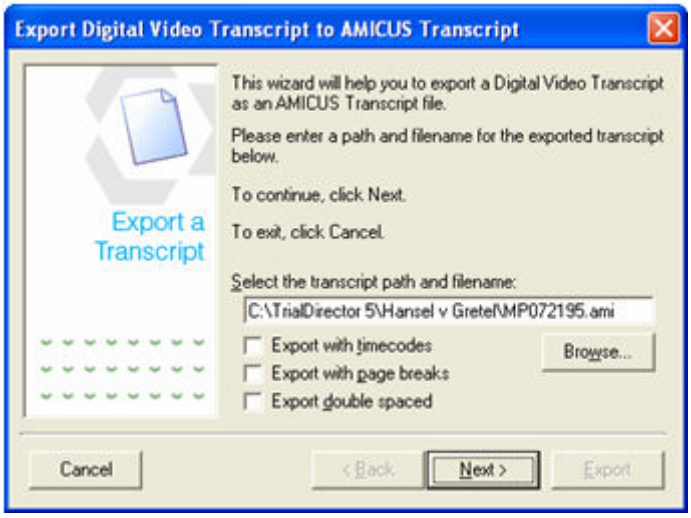
- Export a Transcript to AMICUS Format

- Export a Transcript to ASCII Format
- Export a Transcript to PTF Format

Any open transcript may be exported in AMICUS, ASCII or Portable Transcript Format. To determine which format is ideal for your purposes, consult the product manual for the application into which you plan to import the transcript. The example below represents an AMICUS transcript - the ASCII & PTF steps are virtually identical.

Export a Transcript to AMICUS Format

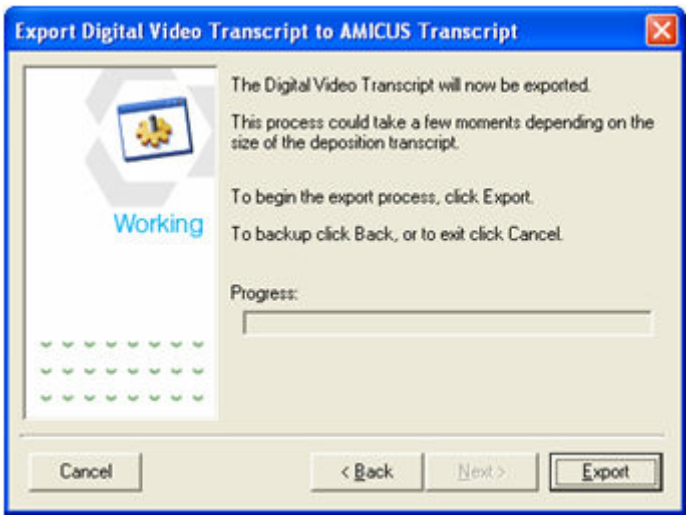
1. Open the Digital Video Transcript you want to export.
2. Select **Export Transcript To... | AMICUS Transcript (*.ami)** from the Transcripts menu.


Export Digital Video Transcript to AMICUS Transcript
This wizard will help you to export a Digital Video Transcript as an AMICUS Transcript file.
Please enter a path and filename for the exported transcript below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the transcript path and filename:
C:\TrialDirector 5\Hansel v Gretel\MP072195.ami
Export with timecodes
Export with page breaks
Export double spaced
Browse...
Cancel
< Back
Next >
Export

3. Select the *Export with page breaks* option if you wish load the exported file into TrialDirector's *Quick Text Exhibit Creator* feature.
4. Enter a destination path and filename for the exported transcript or click **[Browse]** to navigate to the desired folder.
5. If you clicked **[Browse]**, double-click on the desired folder and type a filename with an *.ami extension in the **File Name** field. Click **[Save]** to save the selected path and return to the previous export window.

Note: *If you are exporting the transcript in ASCII or Portable Transcript Format, use a *.txt or *.ptf extension, respectively.*

6. When the desired path appears, click **[Next]** to continue the export process.


Export Digital Video Transcript to AMICUS Transcript
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

7. Review the export results to ensure that the operation was completed successfully. Click **[OK]** to exit the export process.

Export a Transcript to ASCII Format.

1. Open the Digital Video Transcript you want to export.
2. Select **Export Transcript To... | ASCII Transcript (*.txt)** from the Transcript menu.
3. Skip to step four under Exporting a Transcript to AMICUS Format to finish exporting the Digital Video Transcript. **Make sure to save the transcript with a .*.txt extension.**

Export a Transcript to Portable Transcript Format (.PTF)

1. Open the Digital Video Transcript you want to export.
2. Select **Export Transcript To... | Portable Transcript Format (*.ptf)** from the Transcript menu.
3. Skip to step four under Exporting a Transcript to AMICUS Format to finish exporting the Digital Video Transcript. **Make sure to save the transcript with a *.ptf extension.**

More Information:

- Digital Video Transcript
- Transcript Text

Attached and Synchronized Exhibits

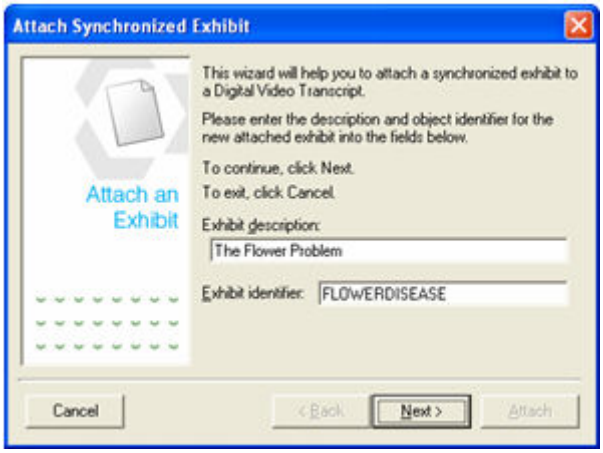
Attach an Exhibit to the Transcript

Exhibits can be attached to the transcript at specific points so that when the Digital Video Transcript is played back in Presentation mode, the exhibit attachments are automatically displayed at the designated time. Attached exhibits display in the Exhibit Preview pane, in the lower right corner of the Transcript Manager tab.

Note: *Exhibit attachments are associated with the transcript and not just particular clips. This means that an attached exhibit will be displayed when TrialDirector reaches the point where it was inserted in the transcript, regardless of which particular clip is being played.*

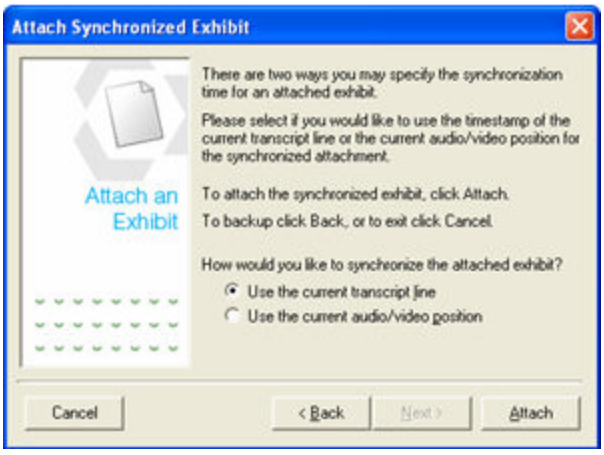
Prior to attaching an exhibit, make sure that the **Display Attached Exhibits** option is enabled under the Transcript menu. In addition, you can set the Options dialog to display attached exhibits automatically when opening a Digital Video Transcript.

1. Check that the **Display Attached Exhibits** option is enabled under the Transcript menu
2. To attach an exhibit to the transcript, place the cursor at the desired insertion point on the transcript and choose **Attach Synchronized Exhibit...** from the Transcripts menu or right click on the Transcript Window and select **Attach Synchronized Exhibit...** from the drop-down menu. If the cursor is at a synchronized point in the transcript, the following window will appear:


Attach Synchronized Exhibit
This wizard will help you to attach a synchronized exhibit to a Digital Video Transcript.
Please enter the description and object identifier for the new attached exhibit into the fields below.
To continue, click Next.
To exit, click Cancel.
Attach an Exhibit
Exhibit description:
The Flower Problem
Exhibit identifier:
FLOWERDISEASE
Cancel
< Back
Next >
Attach

Note: *The current selected item in the Document Manager will be used as the default* ***Exhibit Identifier.***

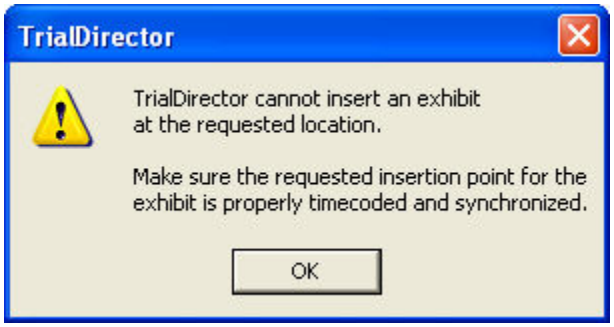
3. Change the exhibit description and exhibit identifier as desired. Keep in mind that the exhibit identifier entered must exist in the same case in TrialDirector.
4. When the settings are correct, click **[Next]** to continue.


Attach Synchronized Exhibit
There are two ways you may specify the synchronization time for an attached exhibit.
Please select if you would like to use the timestamp of the current transcript line or the current audio/video position for the synchronized attachment.
Attach an Exhibit
To attach the synchronized exhibit, click Attach.
To backup click Back, or to exit click Cancel.
How would you like to synchronize the attached exhibit?
Use the current transcript line
Use the current audio/video position
Cancel
< Back
Next >
Attach

5. Select the **Use current audio/video position** option to display the exhibit at a precise time within the deposition.
6. The exhibit attachment can be synchronized with the timecode associated with the transcript line where the cursor is currently positioned or it can be synchronized with the current time that appears in the Multimedia Manager.
7. Specify how you would like to synchronize the exhibit and click **[Attach]** to attach the exhibit to the transcript or **[Cancel]** to cancel the attachment. You can also click **[Back]** to return to the previous window, if desired.

The attachment will appear as hidden text in the transcript, and the exhibit identifier will appear in the Exhibits folder in the Transcript Explorer.

Note: *If you try to attach an exhibit at a point in the transcript that is not synchronized with the multimedia (e.g., the title and appearances pages), the following window will appear:*


TrialDirector
TrialDirector cannot insert an exhibit at the requested location.
Make sure the requested insertion point for the exhibit is properly timecoded and synchronized.
OK

8. Click **[OK]** to return to the Transcript Manager tab. Position the cursor at a properly timecoded and synchronized point in the transcript and try again.

More Information:

- Open the Attached Exhibit
- Turn Exhibit Synchronization On or Off
- View a Synchronized Exhibit
- Remove an Attached Exhibit

Open an Attached Exhibit

To preview an exhibit attachment, double-click on the appropriate exhibit identifier in the Exhibits folder in the Transcript Explorer. The selected exhibit will be displayed in the Exhibit Preview pane.

TrialDirector will also jump to the point in the transcript where the exhibit is attached if digital video synchronization is enabled.

Note: *The reference to the attached exhibit will only be visible in the transcript if the hidden text is enabled.*

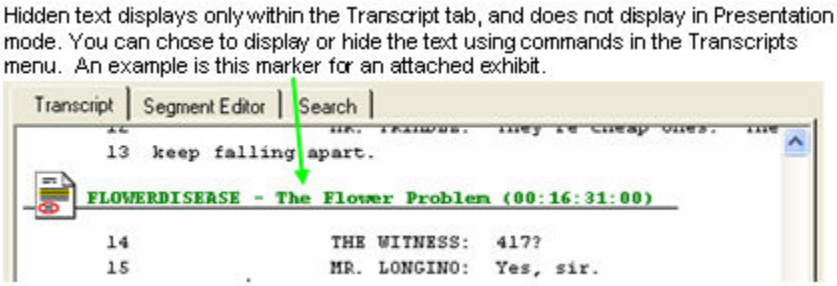
More Information:

- Attach an Exhibit to the Transcript
- Open the Attached Exhibit
- Turn Exhibit Synchronization On or Off
- View a Synchronized Exhibit
- Remove an Attached Exhibit

Remove an Attached Exhibit

To remove an attached exhibit from the transcript,

1. Display hidden text markers for the attached exhibit by selecting the Display Attached Exhibits command from the Transcripts menu.


Hidden text displays only within the Transcript tab, and does not display in Presentation mode. You can chose to display or hide the text using commands in the Transcripts menu. An example is this marker for an attached exhibit.
Transcript
Segment Editor
Search
13 keep falling apart.
FLOWERDISEASE - The Flower Problem (00:16:31:00)
14 THE WITNESS: 417?
15 MR. LONGINO: Yes, sir.

2. Select the desired exhibit attachment in the Transcript Window using the cursor. Then either:

- Select **Remove Synchronized Exhibit** from the Transcript menu
- Right-click on the Transcript Window and select **Remove Exhibit** from the shortcut menu

3. Click **[Yes]** to remove the exhibit attachment or **[No]** to cancel the removal.

Note: *This process will not remove the item from the case. It only removes the link to the exhibit.*

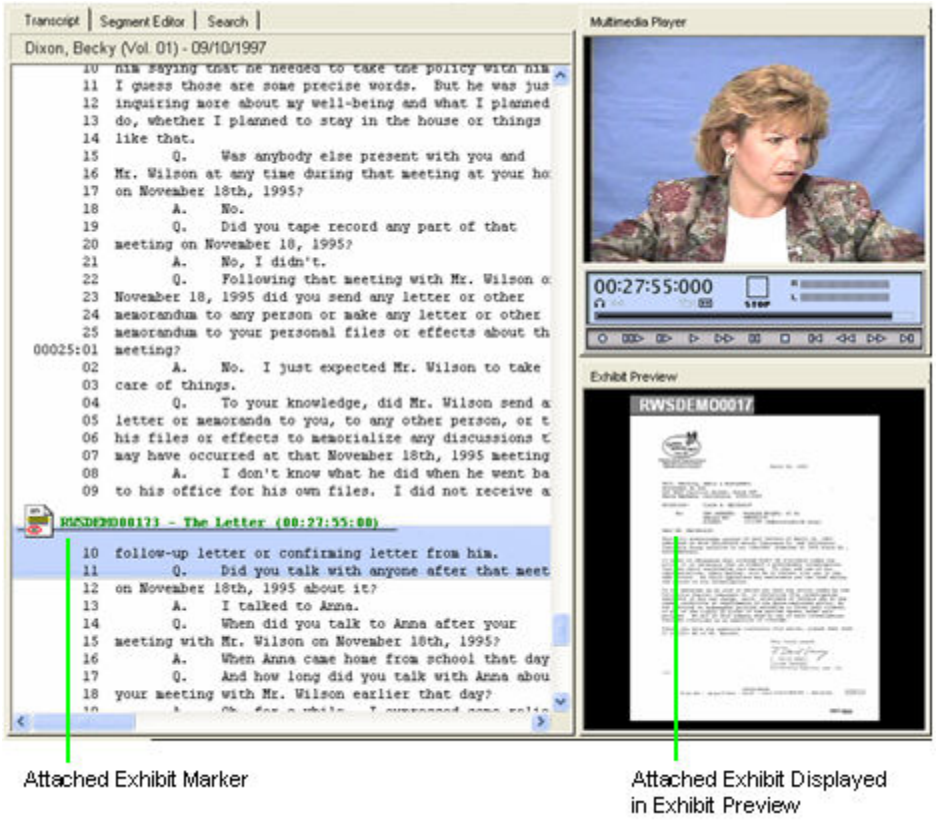
More Information:

- Attach an Exhibit to the Transcript
- Open the Attached Exhibit
- Turn Exhibit Synchronization On or Off
- View a Synchronized Exhibit
- Remove an Attached Exhibit

View a Synchronized Exhibit

To view an attached exhibit in sync with a Digital Video Transcript in the Transcript Manager, follow these steps:

1. Enable Exhibit Synchronization by clicking on the **[Enable or Disable Exhibit Synchronization]** button on the Toolbar, if it is not already enabled.
2. Play any portion of the transcript that contains an exhibit attachment. When the transcript reaches the exhibit attachment, the exhibit will be automatically opened in the Exhibit Preview pane, as shown in the figure below.



Note: *The position of the exhibit marker may be hidden. To display the hidden markers, click Display Attached Exhibits from the Transcripts menu.*

To view an attached exhibit in sync with a Digital Video Transcript in Presentation mode, use the **Present Clip** command. Exhibit synchronization is automatically enabled in Presentation mode.

More Information:

- Attach an Exhibit to the Transcript

- Open the Attached Exhibit
- Turn Exhibit Synchronization On or Off
- View a Synchronized Exhibit
- Remove an Attached Exhibit

Turn Exhibit Synchronization On or Off

To enable exhibit synchronization, either

- Select **Digital Video Synchronization** from the Transcript menu
- Click the **[Enable or Disable Digital Video Synchronization]** button on the Toolbar.

To disable exhibit synchronization, either,

- Deselect the **Digital Video Synchronization** from the Transcript menu
- Click the **[Enable or Disable Digital Video Synchronization]** button on the Toolbar again.
- You can also click on the vertical scroll bar to disable exhibit synchronization.

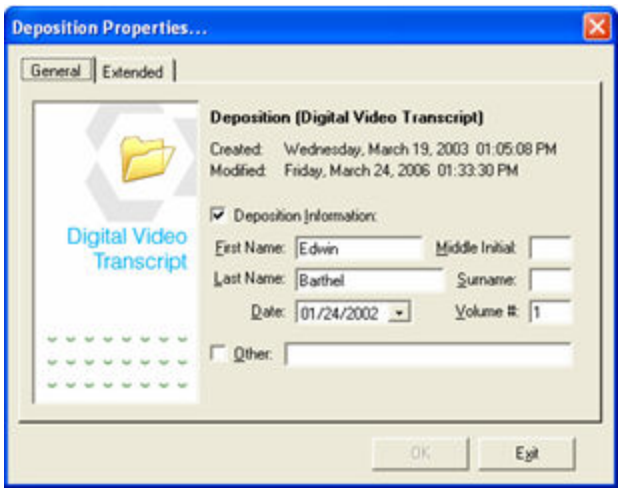
More Information:

- Attach an Exhibit to the Transcript
- Open the Attached Exhibit
- Turn Exhibit Synchronization On or Off
- View a Synchronized Exhibit
- Remove an Attached Exhibit

Change Digital Video Transcript Properties

To change the Digital Video Transcript information that appears next to the Digital Video Transcript folder in the Case Explorer,

1. Right-click on the desired Digital Video Transcript and select **Properties** from the shortcut menu.



2. Alter the Deposition Information fields as desired and click **[OK]** to save the changes or **[Exit]** to abandon the changes. If the **[OK]** button is not available, make sure you have filled out all of the required fields and try again.

The following fields are available for modification:

Field	Description
First Name	Deponent's first name
Middle Initial	Deponent's middle initial
Last Name	Deponent's last name
Surname	Deponent's surname
Date	Deposition date
Volume #	Deposition volume number
Other	Additional Information

The First Name, Last Name, Date and Volume # fields are required if the **Deposition Information** box is checked. To disable the deposition information, un-check the **Deposition Information** box.

An entry in the Other field is required if the **Other** box is checked. To disable the Other field, un-check the **Other** box.

Note: *At least one of the boxes must be checked.*

The following field is displayed for viewing in the Extended Tab (but is not modifiable):

Field	Description
Authoring Entity	This will display who authored the DVT file.

More Information:

- Digital Video Transcript
- Import a Digital Video Transcript
- Open a Digital Video Transcript
- View a Digital Video Transcript
- Change Digital Video Transcript Properties
- Close a Digital Video Transcript
- Remove Digital Video Transcripts

Highlights and Font Colors

Topics:

- Highlighting
- Automatic Color Coding
- Remove All Color Codes and Highlights

The Transcript Manager allows you to alter the default colors of the transcript font and also highlight certain sections of it. These font color and highlight changes will show in Presentation mode when displaying transcript text.

Display Highlighting

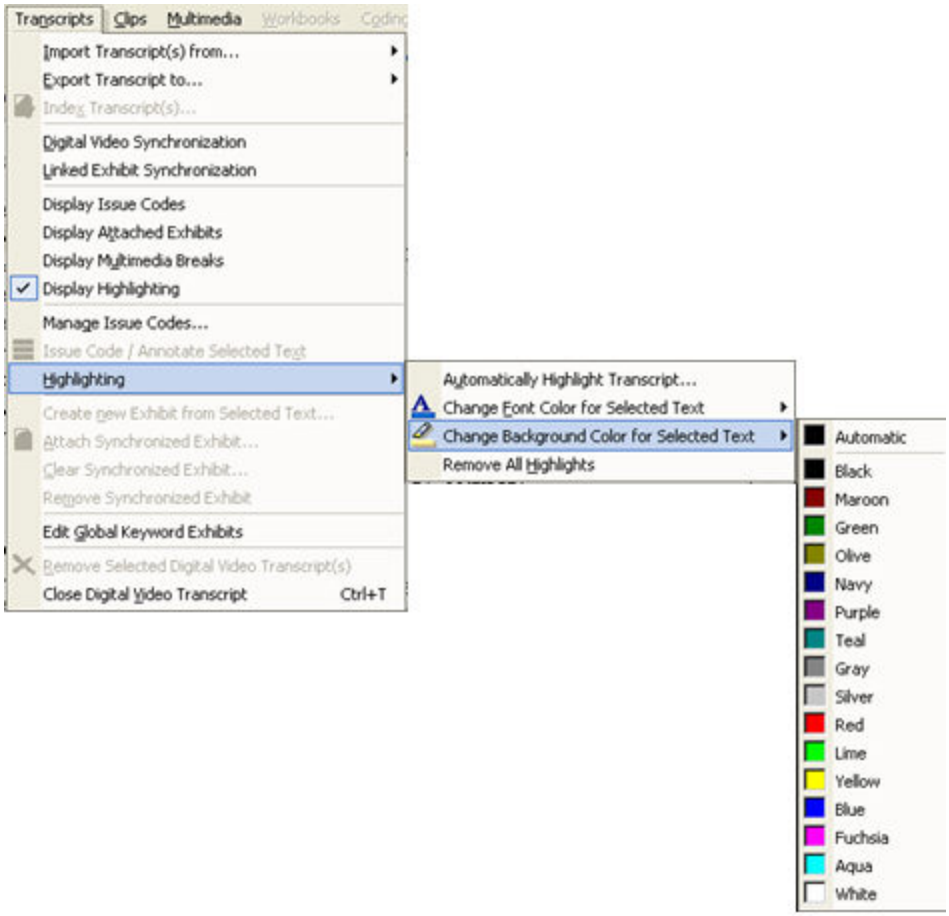
In order to display and/or create transcript highlights and font colors, the **Display Highlighting** option must be enabled. To enable this option, select the **Display Highlighting** option under the Transcripts menu.

Note: *Enabling the* ***Display Highlighting*** *option will disable* ***Display Attached Exhibits*** *and* ***Display Multimedia Breaks****.*

Highlight Text or Change Font Color

1. Make sure the **Display Highlighting** option is enabled.

2. Select the transcript text you want highlighted.
3. Select the **Change Font Color** or **Change Background Color** option from the **Highlighting** menu.
4. Select the desired font or background color from the list, as show below.



Remove a Highlight or Font Color

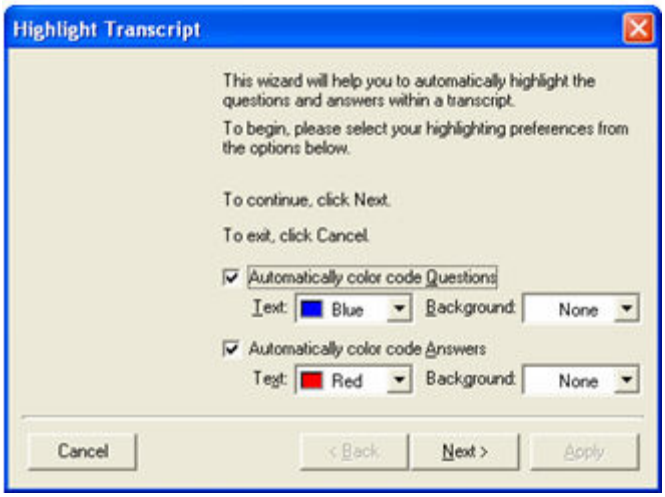
1. Make sure the **Display Highlighting** option is enabled.
2. Select the transcript text you want un-highlighted.
3. Select the **Change Font Color** or **Change Background Color** option from the **Highlighting** menu.
4. Select the desired font or background color from the list.

Automatic Color Coding

The Transcript Manager allows you to automatically color code the question and answer sections in a transcript for easier viewing. It allows you to assign the same font and/or background color to each of the questions, and a different color and/or background to each of the answers.

1. Make sure the **Display Highlights** option is enabled.

2. To color code a transcript, select **Highlighting** from the **Transcripts** menu, then select **Automatically Highlight Transcript** from the submenu. The dialog below will appear.


Highlight Transcript
This wizard will help you to automatically highlight the questions and answers within a transcript.
To begin, please select your highlighting preferences from the options below.
To continue, click Next.
To exit, click Cancel.
Automatically color code Questions
Text: Blue
Background: None
Automatically color code Answers
Text: Red
Background: None
Cancel
< Back
Next >
Apply

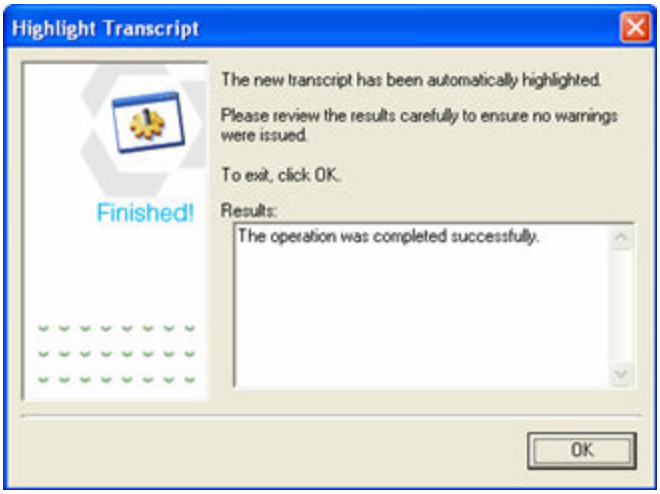
Note: *DVT Clips created from color coded transcripts will use the font colors when presented in TrialDirector.*

3. To color code questions, enable the **Automatically Color Code Questions** check box.
   - Select the desired font color in the **Text** field or select **None** to leave the font the way it is.
   - Select the desired background color in the **Background** field or select **None** to leave the questions un-highlighted.
4. To color code answers, select **Automatically Color Code Answers** check box.
   - Select the desired font color in the **Text** field or select **None** to leave the font the way it is.
   - Select the desired background color in the **Background** field or select **None** to leave the questions un-highlighted.

5. Click **[Next]**.

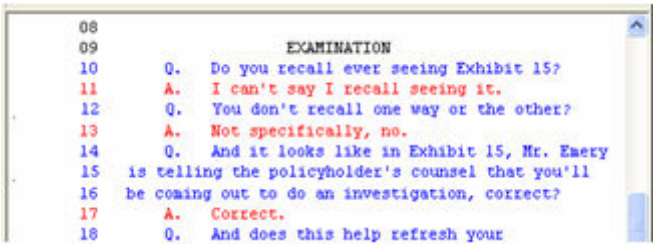
Highlight Transcript
The new transcript will now be highlighted based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To apply the specified highlights, click Apply.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Apply

6. To begin color-coding your current transcript, click **[Apply]**.
7. When the progress bar reaches the end, click **[Next]**.


Highlight Transcript
The new transcript has been automatically highlighted.
Please review the results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

5. Verify that the Results box shows that no errors were reported, then click **[OK]**.

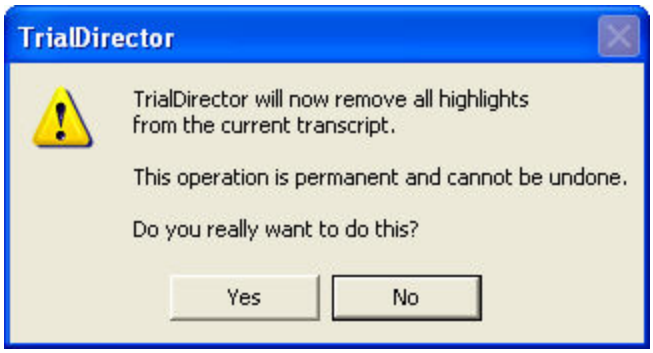
The transcript will be color-coded, as shown in the example below.


EXAMINATION
Q. Do you recall ever seeing Exhibit 15?
A. I can't say I recall seeing it.
Q. You don't recall one way or the other?
A. Not specifically, no.
Q. And it looks like in Exhibit 15, Mr. Emery is telling the policyholder's counsel that you'll be coming out to do an investigation, correct?
A. Correct.
Q. And does this help refresh your

Remove All Highlights

To remove all of the color codes and highlights previously created:

1. Select the **Remove All Highlights** command from the **Transcripts | Highlights** menu.
2. A confirmation dialog box will appear. Click **[Yes]** to remove all color codes and background highlights.


TrialDirector
TrialDirector will now remove all highlights from the current transcript.
This operation is permanent and cannot be undone.
Do you really want to do this?
Yes
No

Note: *The "cannot be undone" warning refers to the "undo" command common on Windows computers. You can re-assign color codes and highlights at any time using the procedure above.*

More Information:

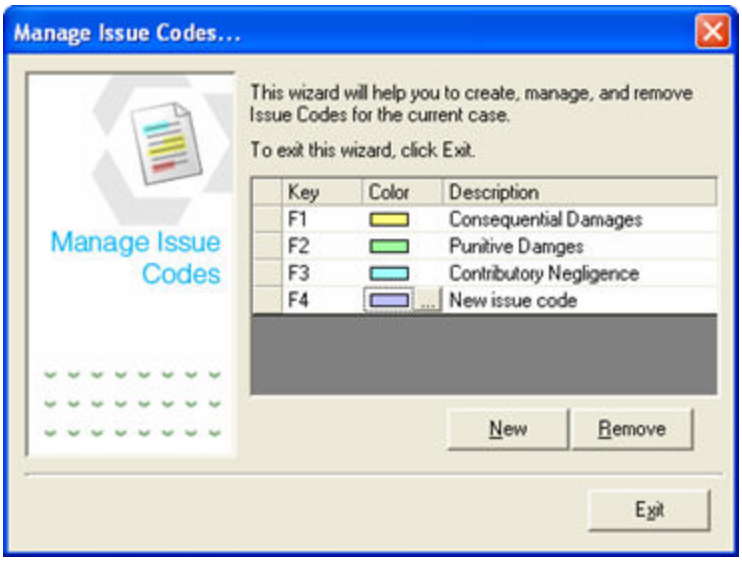
- Digital Video Transcript
- Transcript Text

Identifying and Color Coding Issues

You can create color-coded lists of key issues in transcripts, and capture key passages for easy recall during trial. You begin by establishing issue codes and colors, then you assign the codes to selected transcript text. Finally, you can print detailed or summary reports all identified issues.

Creating Issue Codes

1. In the Transcript Manager, open the **Transcripts** menu and select **Manage Issue Codes...**.
2. The **Manage Issue Codes** dialog displays. Click **New** to create a new issue code.



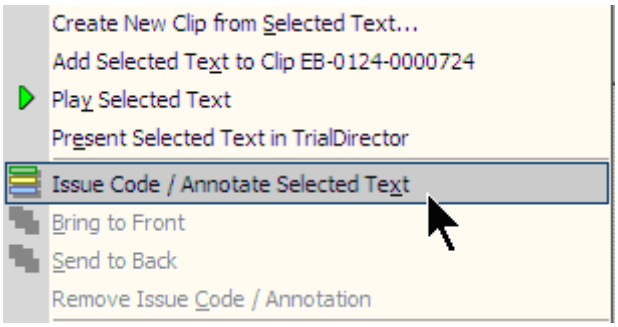
3. Replace the text "New Issue Code" with a short title for the issue you want to add.
4. To change the color of the highlighting that will appear in the transcript for the new issue, click on the color box. A spectrum dialog opens from which you can select a color.

Note: *Avoid assigning dark colors or you won't be able to view the testimony through the issue code highlighting.*

5. To change the function key associated with the issue, click on the F# and select the new function key from the list.
6. Click **New** again to continue adding issues as desired. When you are finished, click **Exit**.

Assigning Issue Codes

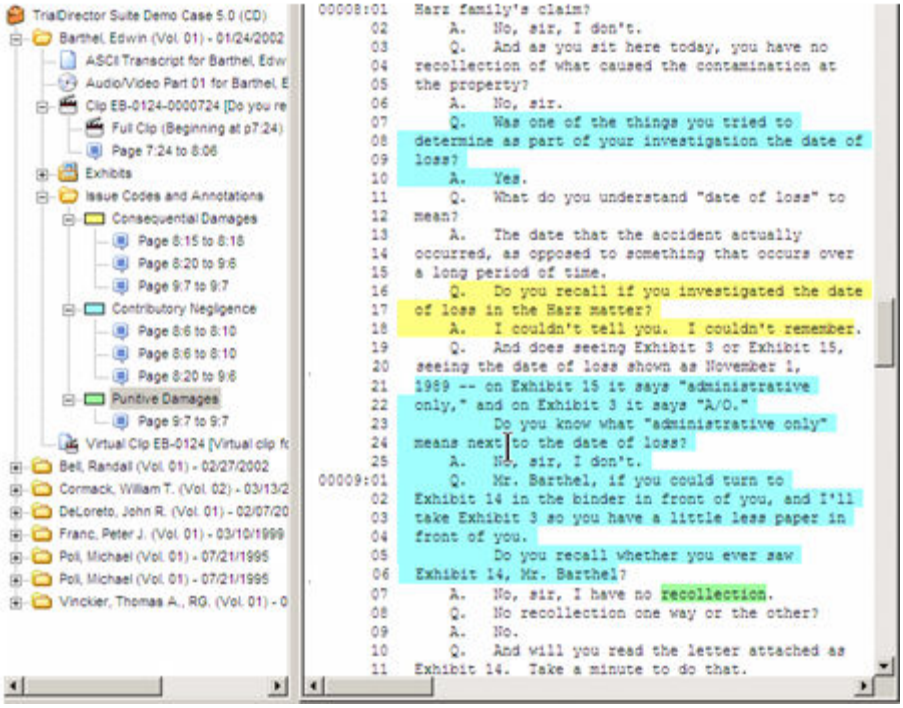
1. With a transcript open in the Transcript Manager, locate and select testimony to which you would like to assign one or more issue codes.


Create New Clip from Selected Text...
Add Selected Text to Clip EB-0124-0000724
Play Selected Text
Present Selected Text in TrialDirector
Issue Code / Annotate Selected Text
Bring to Front
Send to Back
Remove Issue Code / Annotation

2. Right-click on the selected text, then select **Issue Code / Annotate Selected Text** from the shortcut menu. The issue code list opens.

3. Click on each of the issues that you want to assign to the text. Click **Apply**, then **Exit**. When you assign issues to text, two things happen:

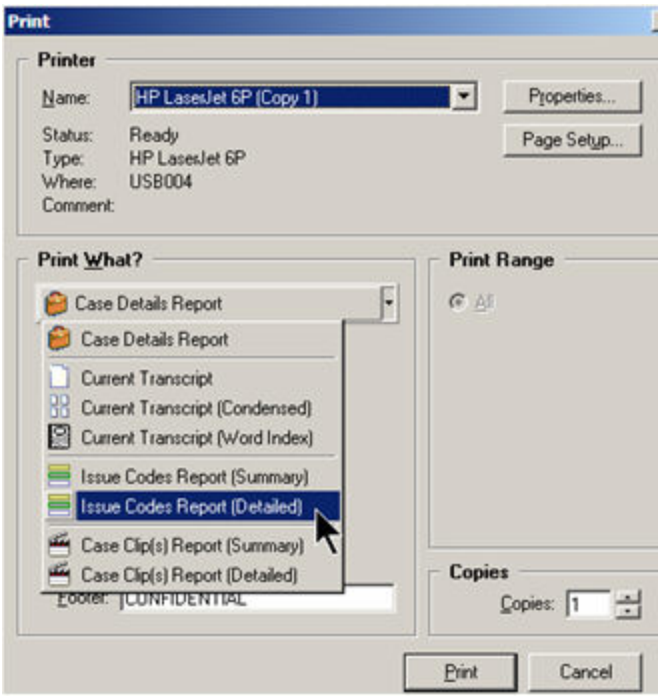
    - The transcript is highlighted to reflect the color of the issue you assign. If you assign more than one issue to the same text, only the color of the last issue code appears on the screen.
    - In the Transcript Explorer, the text citation appears under Issue Codes and Annotations for that witness, organized according to issue.


TrialDirector Suite Demo Case 5.0 (CD)
Barthel, Edwin (Vol. 01) - 01/24/2002
ASCII Transcript for Barthel, Edw
Audio/Video Part 01 for Barthel, E
Clip EB-0124-0000724 [Do you re
Full Clip (Beginning at p7:24)
Page 7:24 to 8:06
Exhibits
Issue Codes and Annotations
Consequential Damages
Page 8:15 to 8:18
Page 8:20 to 9:6
Page 9:7 to 9:7
Contributory Negligence
Page 8:6 to 8:10
Page 8:6 to 8:10
Page 8:20 to 9:6
Punitive Damages
Page 9:7 to 9:7
Virtual Clip EB-0124 [Virtual clip fc
Bell, Randall (Vol. 01) - 02/27/2002
Cormack, William T. (Vol. 02) - 03/13/2
DeLoreto, John R. (Vol. 01) - 02/07/20
Franc, Peter J. (Vol. 01) - 03/10/1999
Poli, Michael (Vol. 01) - 07/21/1995
Poli, Michael (Vol. 01) - 07/21/1995
Vinckier, Thomas A., RG. (Vol. 01) - 0
00008:01 Harz family's claim?
02 A. No, sir, I don't.
03 Q. And as you sit here today, you have no
04 recollection of what caused the contamination at
05 the property?
06 A. No, sir.
07 Q. Was one of the things you tried to
08 determine as part of your investigation the date of
09 loss?
10 A. Yes.
11 Q. What do you understand "date of loss" to
12 mean?
13 A. The date that the accident actually
14 occurred, as opposed to something that occurs over
15 a long period of time.
16 Q. Do you recall if you investigated the date
17 of loss in the Harz matter?
18 A. I couldn't tell you. I couldn't remember.
19 Q. And does seeing Exhibit 3 or Exhibit 15,
20 seeing the date of loss shown as November 1,
21 1989 -- on Exhibit 15 it says "administrative
22 only," and on Exhibit 3 it says "A/O."
23 Do you know what "administrative only"
24 means next to the date of loss?
25 A. No, sir, I don't.
00009:01 Q. Mr. Barthel, if you could turn to
02 Exhibit 14 in the binder in front of you, and I'll
03 take Exhibit 3 so you have a little less paper in
04 front of you.
05 Do you recall whether you ever saw
06 Exhibit 14, Mr. Barthel?
07 A. No, sir, I have no recollection.
08 Q. No recollection one way or the other?
09 A. No.
10 Q. And will you read the letter attached as
11 Exhibit 14. Take a minute to do that.

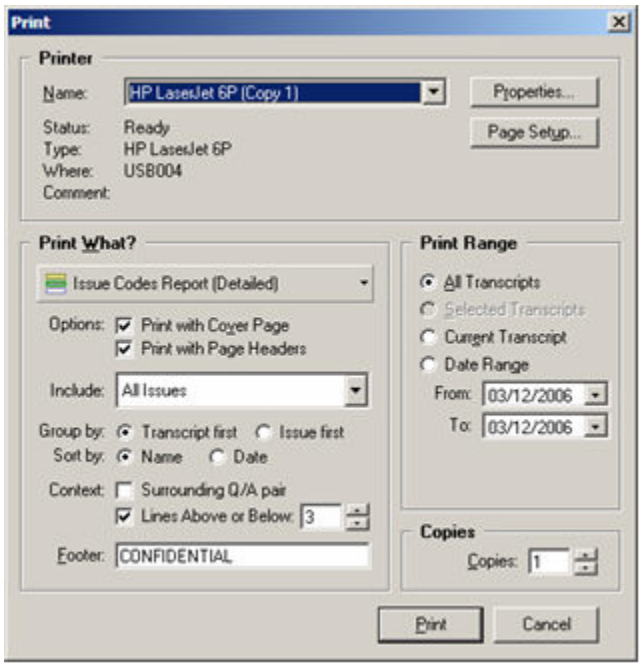
Printing Issue Code Reports

You can print either summary or detailed reports of case issue codes. The example below describes the process for a detailed report.

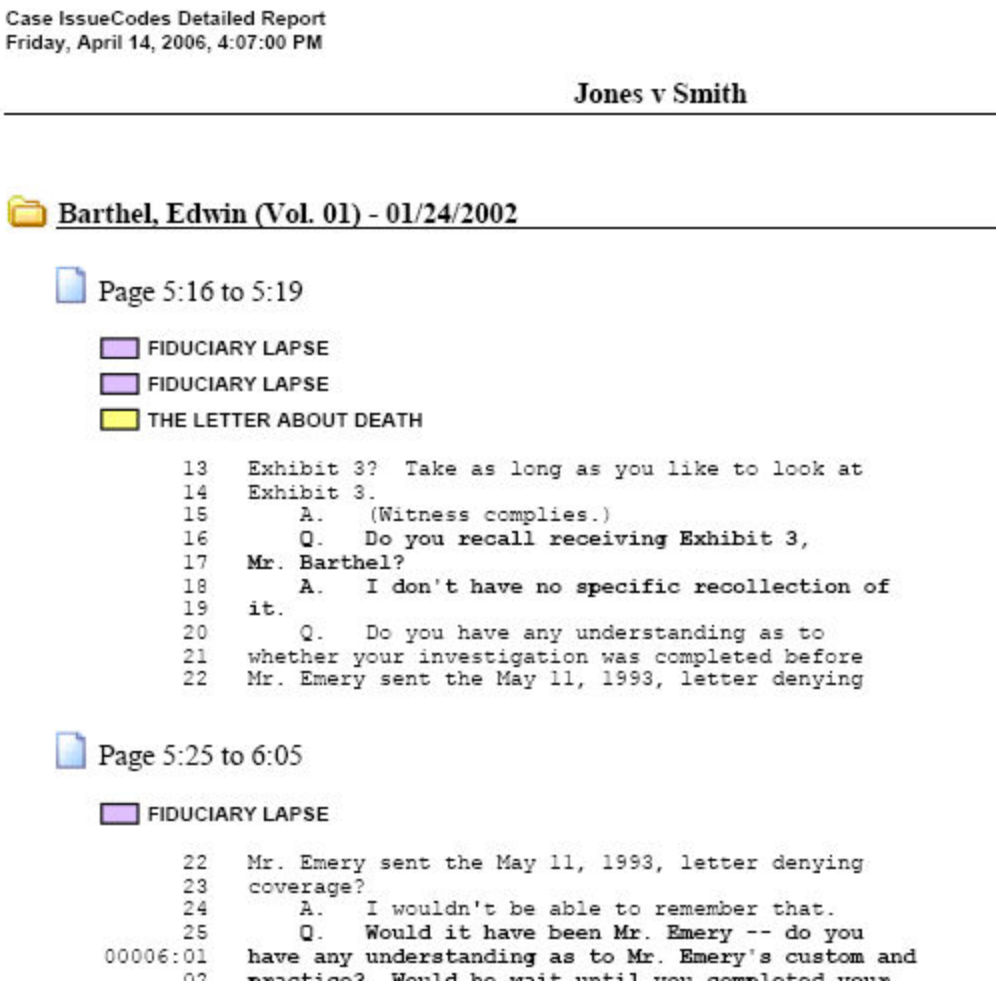
1. From anywhere in TrialDirector, open the **File** menu and select **Print**.
2. Under **Print What?**, click on the drop-down arrow and select **Issue Codes Report (Detailed)**.



3. Customize the Issue Codes Report using any of several settings. Group by transcript name or by issue. Include all issues or only selected issues. Display the related Q&A pair or only a selected number of lines. Print the issues for all transcripts, the current transcript, selected transcripts or transcript within a specified date range.



4. Click **Print**. The report is compiled and printed by TrialDirector. Depending on the selections you made in the Print dialog, your issue report will look similar to the following example:



Case IssueCodes Detailed Report
Friday, April 14, 2006, 4:07:00 PM

Jones v Smith

Barthel, Edwin (Vol. 01) - 01/24/2002

Page 5:16 to 5:19

FIDUCIARY LAPSE
FIDUCIARY LAPSE
THE LETTER ABOUT DEATH

13 Exhibit 3? Take as long as you like to look at
14 Exhibit 3.
15 A. (Witness complies.)
16 Q. Do you recall receiving Exhibit 3,
17 Mr. Barthel?
18 A. I don't have no specific recollection of
19 it.
20 Q. Do you have any understanding as to
21 whether your investigation was completed before
22 Mr. Emery sent the May 11, 1993, letter denying

Page 5:25 to 6:05

FIDUCIARY LAPSE

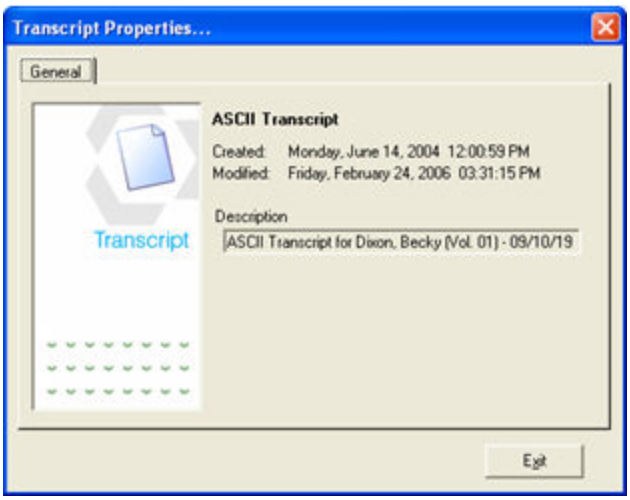
22 Mr. Emery sent the May 11, 1993, letter denying
23 coverage?
24 A. I wouldn't be able to remember that.
25 Q. Would it have been Mr. Emery -- do you
00006:01 have any understanding as to Mr. Emery's custom and

More Information:

- Toolbar
- Case Explorer
- Organizer Window
- Transcript Window and Word Index.

View Transcript Properties

To view transcript information for a Digital Video Transcript, right-click on the desired transcript in the Transcript Explorer and select **Properties** from the drop-down menu.



Note: *The Properties dialog displays the transcript description and is not modifiable.*

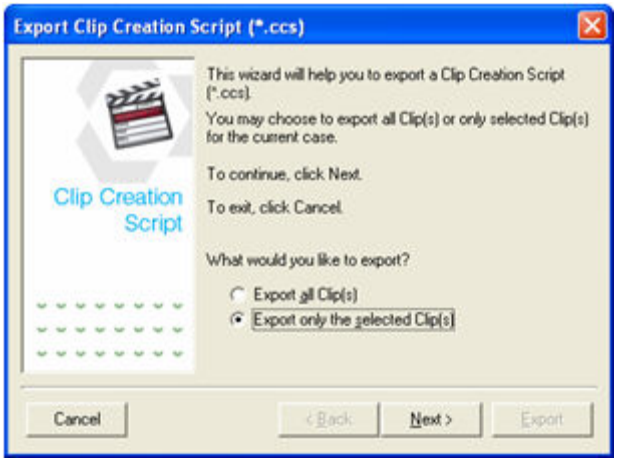
More Information:

- Digital Video Transcript
- Transcript Text

Export Clips to a Clip Creation Script

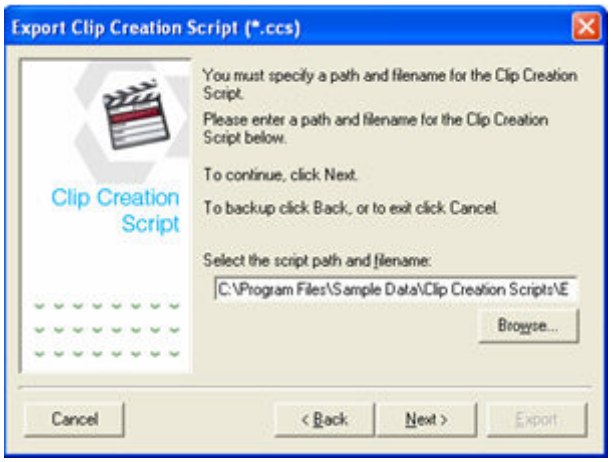
Creating a Clip Creation Script from clips in a case allows you to create identical clips on another computer.

1. Open the Transcript Manager and select View by Clips in the Transcript Explorer.
2. Select the clips you want to include in the clip creation script by enabling the check box next to each desired clip.
3. From the Clips menu, select **Export Clip Creation Script (*.ccs)** .


Export Clip Creation Script (*.ccs)
This wizard will help you to export a Clip Creation Script (*.ccs).
You may choose to export all Clip(s) or only selected Clip(s) for the current case.
To continue, click Next.
To exit, click Cancel.
Clip Creation Script
What would you like to export?
Export all Clip(s)
Export only the selected Clip(s)
Cancel
< Back
Next >
Export

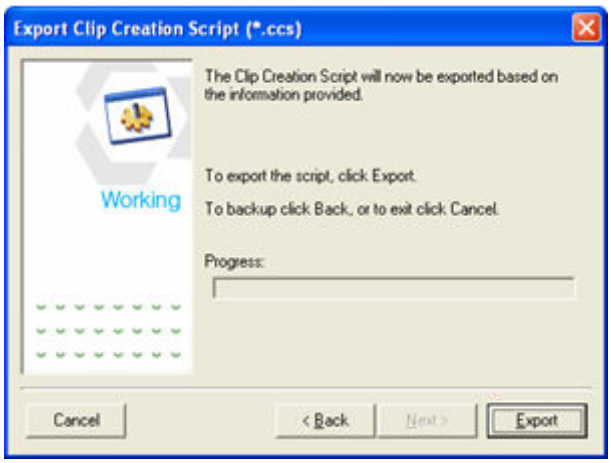
Note: *The Export only the select clip(s) option is unavailable if there are no clips selected in the Transcript Explorer.*

4. Select the option to export all clips or selected clips and click **[Next]** to continue.


Export Clip Creation Script (*.ccs)
You must specify a path and filename for the Clip Creation Script.
Please enter a path and filename for the Clip Creation Script below.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Clip Creation Script
Select the script path and filename:
C:\Program Files\Sample Data\Clip Creation Scripts\E
Browse...
Cancel
< Back
Next >
Export

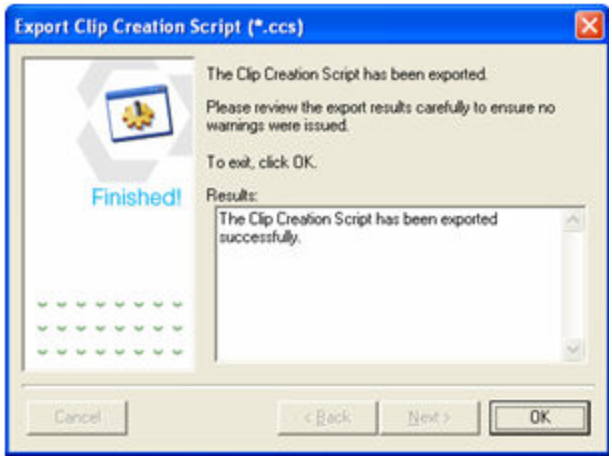
Note: *The script export path defaults to the TrialDirector installation directory.*

5. Click **[Browse]** to select a new destination path for the clip creation script or leave the default destination path and click **[Next]** to continue.


Export Clip Creation Script (*.ccs)
The Clip Creation Script will now be exported based on the information provided.
Working
To export the script, click Export.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Export

Note: *You can select clips from several different Digital Video Transcripts for export.*

6. Click **[Export]** to begin exporting the clip creation script.
7. When the progress bar reaches the end, click **[Next]** to continue.


Export Clip Creation Script (*.ccs)
The Clip Creation Script has been exported.
Please review the export results carefully to ensure no warnings were issued.
Finished!
To exit, click OK.
Results:
The Clip Creation Script has been exported successfully.
Cancel
< Back
Next >
OK

Note: *A *.ccs file exported from TrialDirector will contain all of the clip description and identification information. It will also contain the deponent information.*

8. Review the export results carefully to ensure no warnings were issued.
9. Click **[OK]** to exit the export wizard.

Note: *Once a clip creation script has been created, it can be used to create identical clips on a different computer.*

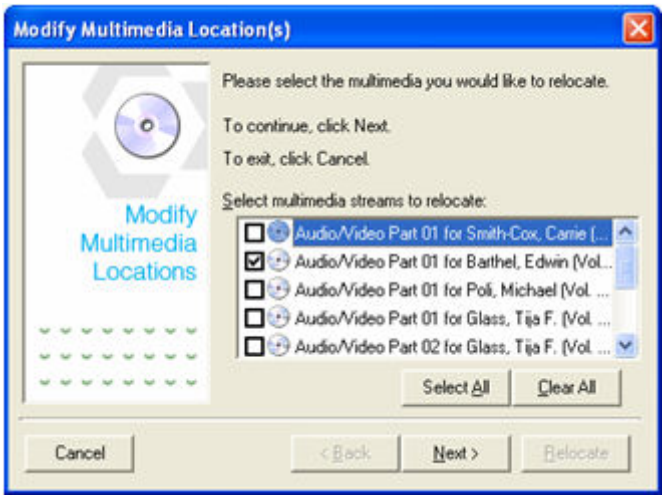
More Information:

- Digital Video Transcript
- Clips

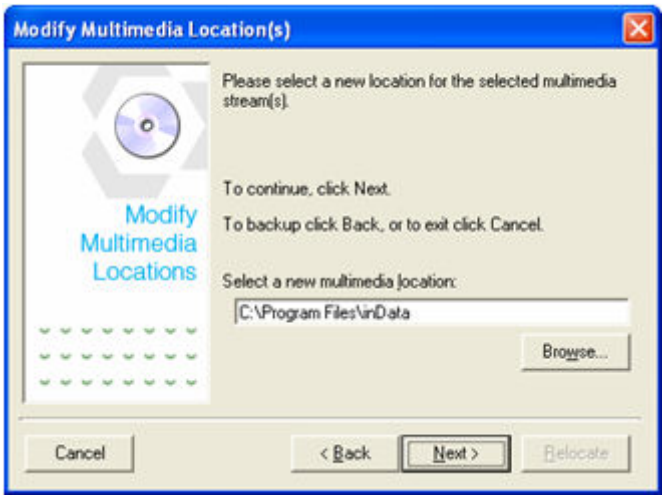
Modify Multimedia Source Paths

If you change the location of the multimedia source files for a Digital Video Transcript, you will need to modify the path to the source files.

1. Select **Modify Multimedia Location(s)** from the Multimedia menu.

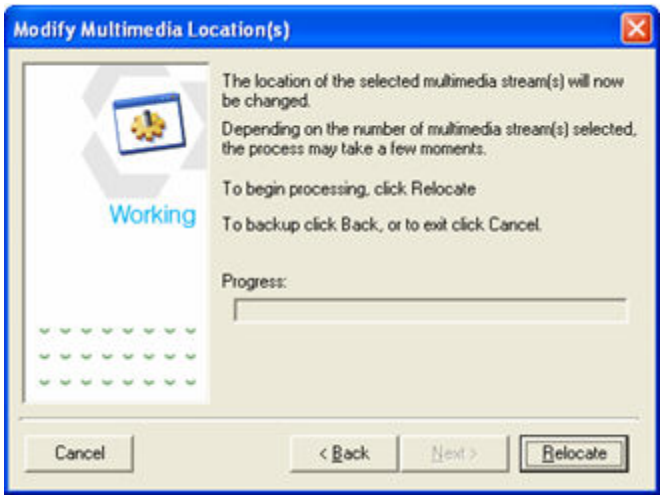

Modify Multimedia Location(s)
Please select the multimedia you would like to relocate.
To continue, click Next.
To exit, click Cancel.
Select multimedia streams to relocate:
Audio/Video Part 01 for Smith-Cox, Carrie (...
Audio/Video Part 01 for Barthel, Edwin (Vol...
Audio/Video Part 01 for Poli, Michael (Vol. ...
Audio/Video Part 01 for Glass, Tija F. (Vol. ...
Audio/Video Part 02 for Glass, Tija F. (Vol. ...
Modify Multimedia Locations
Select All
Clear All
Cancel
< Back
Next >
Relocate

2. Select the multimedia file(s) you want to relocate. Click **[Next]** to continue.



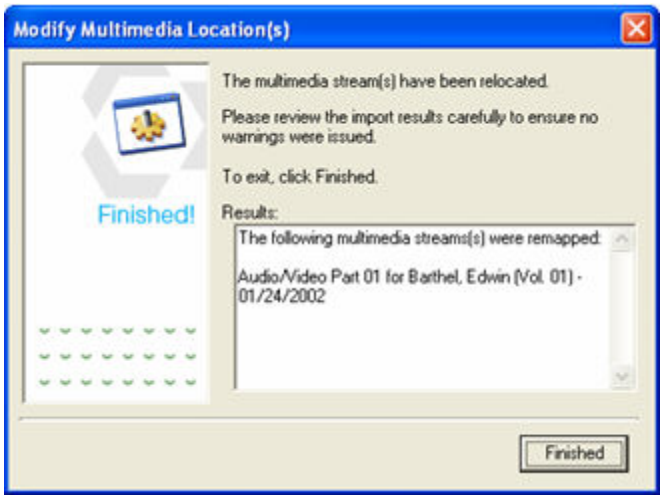
3. Click **[Browse]** to select a new source path for the multimedia file or type in the fully qualified path (including drive letter). Click **[Next]**.

Note: *The new source path can be a local or external hard disk, network drive or UNC path.*


Modify Multimedia Location(s)
The location of the selected multimedia stream(s) will now be changed.
Depending on the number of multimedia stream(s) selected, the process may take a few moments.
To begin processing, click Relocate
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Relocate

Note: *If you simply enter the drive letter or beginning portion of the new source path, TrialDirector will parse the sub-directories to find the proper source files.*

4. Click **[Relocate]** to change the source file location information.
5. When the progress bar reaches the end, click **[Next]**.


Modify Multimedia Location(s)
The multimedia stream(s) have been relocated.
Please review the import results carefully to ensure no warnings were issued.
To exit, click Finished.
Finished!
Results:
The following multimedia streams(s) were remapped:
Audio/Video Part 01 for Barthel, Edwin (Vol. 01) - 01/24/2002
Finished

Note: A warning is displayed if any of the multimedia source files could not be found in the location entered on Step 3.

8. Review the relocation results carefully to ensure no warnings were issued.
9. Click **[Finished]** to exit the relocation process.

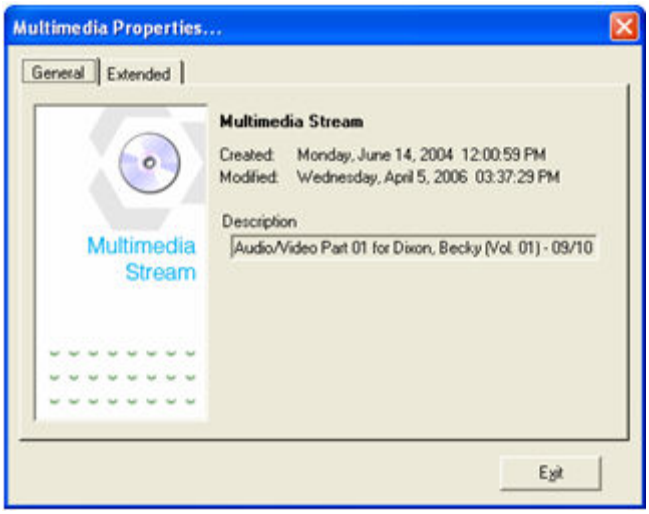
More Information:

- Digital Video Transcripts
- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

View Multimedia Properties

To view the information associated with a multimedia file,

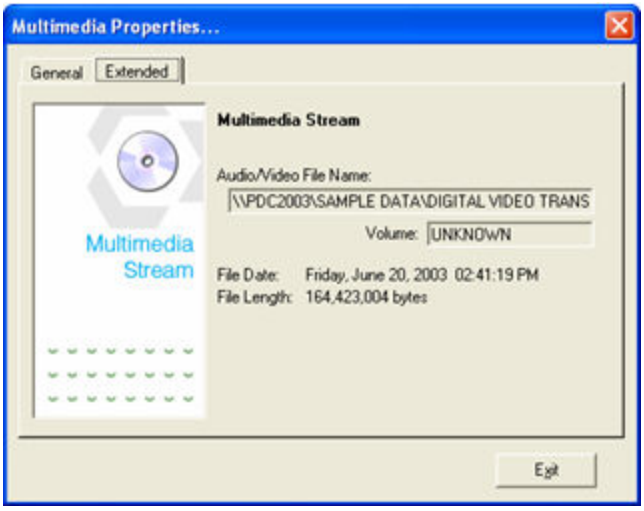
1. Right-click on the desired multimedia file in the Transcript Explorer and select **Properties** from the drop-down menu.



Note: *The Modified time indicates the last time the Multimedia Stream was opened.*

The General tab displays the multimedia description and is not modifiable.

2. Click the **Extended** tab to view the extended multimedia properties.



Note: *The Extended properties is an easy way to determine where the Audio/Video source file is located. If the location is not correct, use the Modify Multimedia Location tool to change.*

The Extended tab displays the multimedia file name and volume and is not modifiable.

3. Click **[Exit]** to close the properties window.

More Information:

- Digital Video Transcripts
- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

Multimedia Resources

When a Digital Video Transcript is opened, the multimedia loads in the Multimedia Player. The Transcript Manager allows you to view Digital Video Transcripts and edit clips and segments using the Multimedia Player.

What do you want to do?

- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

Show Multimedia Breaks

Select the **Display Multimedia Breaks** option from the Transcripts menu to show or hide the beginning of deposition video markers in the transcript. Video markers exist in all transcripts that contain video source files.

It is useful to view the video markers when you are creating clips when creating clips that span multiple CD's.

Note: *Video markers are only searchable when visible*

More Information:

- Digital Video Transcript
- Transcript Text

Turn Audio On or Off

To turn the audio on or off, do one of the following:

- Click the **[Mutes or Restore Audio Playback]** button on the Toolbar.
- Select **Audio Mute** from the Multimedia menu.
- Right Click on the Multimedia Player and select **Audio Mute** from the context menu.

The video will continue playing, and the highlight bar will continue moving with the transcript text if digital video synchronization is enabled.

More Information:

- Digital Video Transcripts
- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

Turn Closed Captioning On or Off

To turn closed captioning on or off, do one of the following:

- Click the **[Shows or Hides Closed Captioning]** button on the Toolbar.
- Select **Closed Captioning** from the Multimedia menu.
- Right-click on the Multimedia Player and select **Closed Captioning** from the context menu.

When closed captioning is enabled, the transcript text will appears in a black box on the bottom of the video window, as shown in the figure below.

Note: *When using the closed captioning feature, select the Transcript tab in the Transcript Window and enable Digital Video Synchronization to ensure that the captions refresh properly*

More Information:

- Digital Video Transcripts
- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

Disconnect Multimedia

There Transcript Manage allows you to disconnect the multimedia from the transcript and reconnect it later. This allows you to search transcripts for specific text without having to change CD's/DVD's during the search.

To disconnect the multimedia from the transcript, do one of the following:

- Click the **[Disconnect Multimedia]** button on the Multimedia Toolbar.
- Select **Disconnect Multimedia** from the Multimedia menu so that it is checked.
- Right-click on the Multimedia player and select **Disconnect Multimedia** from the shortcut menu.

Repeat the process to reconnect the multimedia.

More Information:

- Digital Video Transcripts
- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

Present a Clip in Presentation Mode

Topics:

- Present Normal Text and Video
- Present Text Only
- Present Video Only
- Present Current Segment Only
- Present Selected Text in TrialDirector

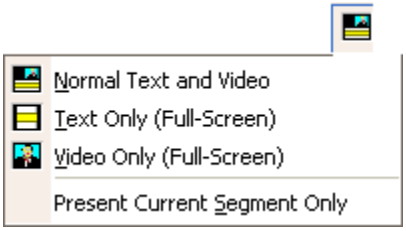
Present Normal Text and Video

To present the current clip in Presentation mode, you can:

- Click the **Presentation** button

on the Toolbar
- Click the small arrow next to the **Presentation** button

and select **Normal Text and Video** from the list of options
- Select **Present in TrialDirector as | Normal Text and Video** from the Clips menu.



Note: *If TrialDirector has never opened the current case, the clip will not be presented. Open the case in Transcript Manager and try again.*

Present Text Only

To present the scrolling transcript on the entire Presentation Display without audio or video:

- Click the small arrow next to the **Presentation** button

and select **Text Only (Full Screen)** from the list of options
- Select **Present in TrialDirector as | Text Only (full Screen)** from the Clips menu.

Present Video Only

- Click the small arrow next to the **Presentation** button

and select **Video Only (Full Screen)** from the list of options
- Select **Present in TrialDirector as | Video Only (full Screen)** from the Clip menu.

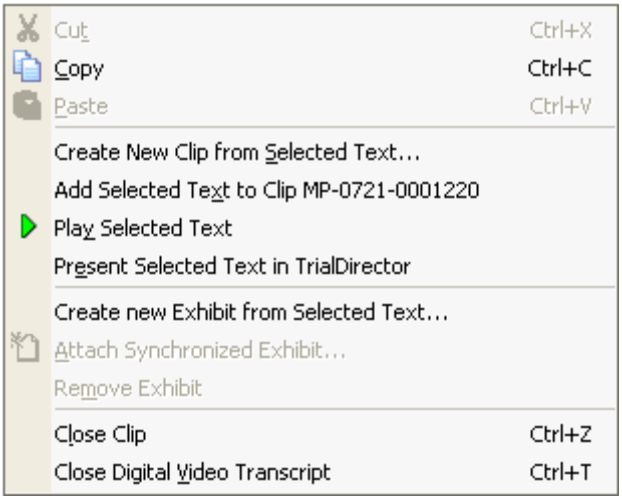
Present Current Segment Only

- Click the small arrow next to the **Presentation** button Presentation and select **Present Current Segment Only** from the list of options
- Selecting **Present in TrialDirector as | Present Current Segment Only** from the Clip menu.

Present Selected Text in Presentation Mode

To present selected text:

1. Click and drag to select the required segment of text from the transcript in the transcript window.
2. Right-click and choose **Present Selected Text in TrialDirector**.



3. The selected transcript and associated video will be presented in Presentation mode (will be opened first if not already open).

More Information:

- Digital Video Transcript
- Clips

Managing Shortcuts to Applications (Tools)

Topics:

- Add an Application Short-Cut
- Edit an Application Short-Cut

- Remove an Application Short-Cut

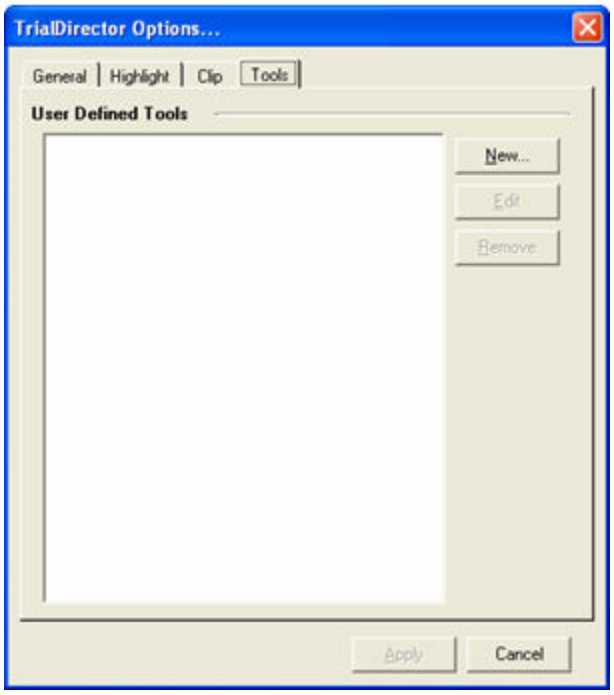
TrialDirector allows you to easily access applications using shortcuts on the Tools menu.

TrialDirector automatically scans your computer to find applications it recognizes (for example, TimeCoder) and adds them to the Tools menu. In addition, you can add short cuts for any other desired application (for example, WordPad) to the Tools menu.

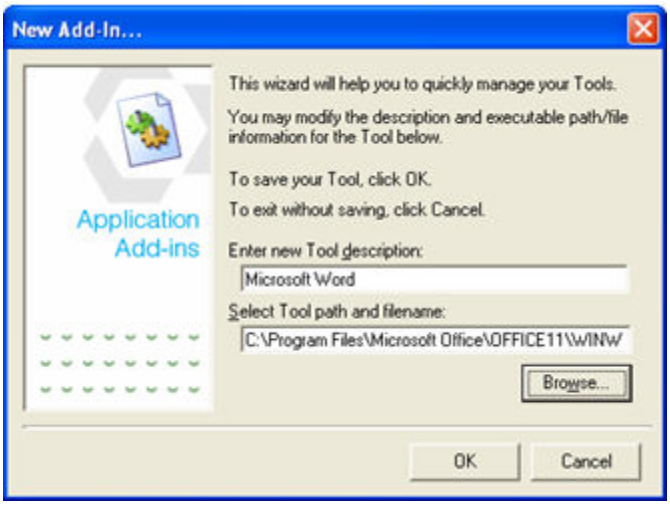
Add an Application Short-Cut

To add an application short-cut to the Tools Menu:

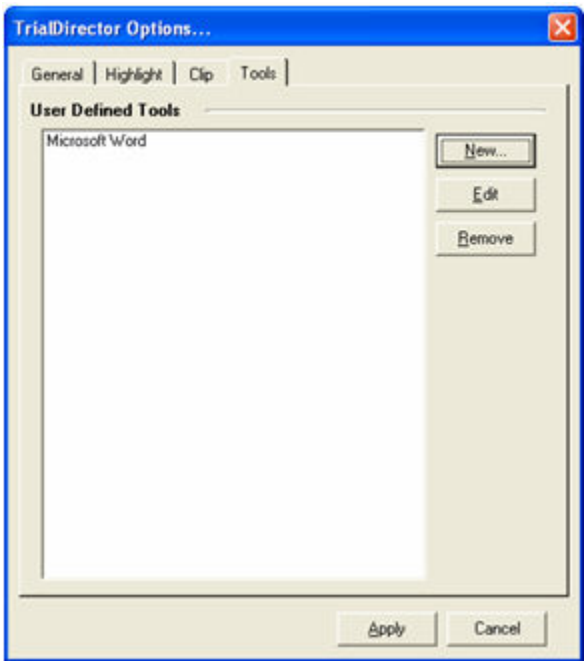
1. From the Transcript Manager, open the Options dialog under the View menu.



2. Click **[New]** to add an application.


New Add-In...
This wizard will help you to quickly manage your Tools.
You may modify the description and executable path/file information for the Tool below.
To save your Tool, click OK.
To exit without saving, click Cancel.
Application Add-ins
Enter new Tool description:
Microsoft Word
Select Tool path and filename:
C:\Program Files\Microsoft Office\OFFICE11\WINW
Browse...
OK
Cancel

3. Enter a description for the new Tool. The description will appear as the short-cut name on the Tools menu.
4. Enter the path and filename or click **[Browse]** to navigate to the application file.
5. When the correct description and path are displayed, click **[OK]** to add the application shortcut or **[Cancel]** to cancel the process. If you click **[OK]**, the new Tool name will now appear on the Tools tab as shown in the figure below.



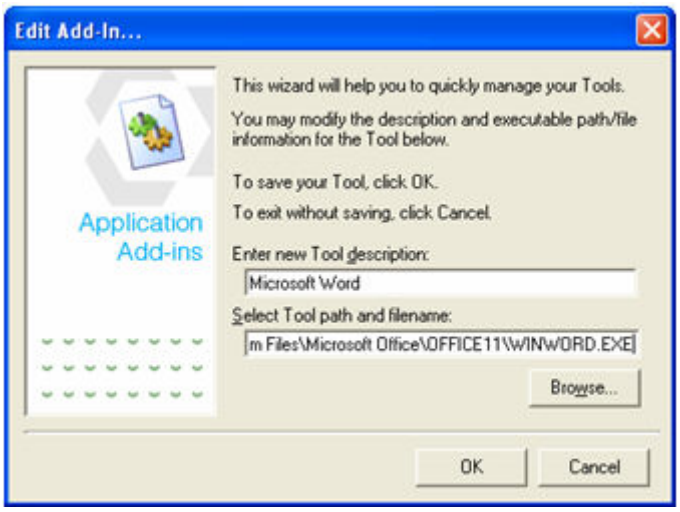
6. Click **[Apply]** to save changes and exit.

Note: *You can add a nearly unlimited number of additional programs as Tools.*

Edit an Application Short-Cut

To edit an application short-cut on the Tools tab:

1. From the Transcript Manager, open the Options dialog under the View menu.
2. Select the application short-cut you would like to edit and click **[Edit]**.

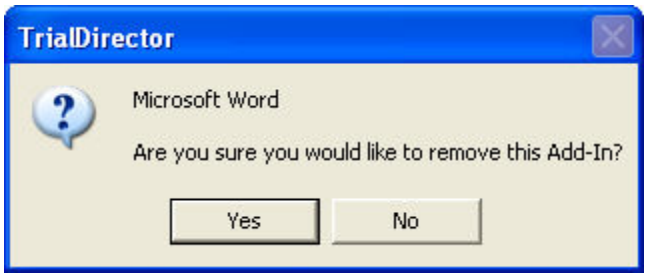

Edit Add-In...
This wizard will help you to quickly manage your Tools.
You may modify the description and executable path/file information for the Tool below.
To save your Tool, click OK.
To exit without saving, click Cancel.
Application Add-ins
Enter new Tool description:
Microsoft Word
Select Tool path and filename:
m Files\Microsoft Office\OFFICE11\WINWORD.EXE
Browse...
OK
Cancel

3. Edit the tool description, if desired. The new description will appear as the shortcut name on the Tools menu.
4. Edit the path and filename or click **[Browse]** to navigate to a different file, if desired.
5. When the desired description and path are displayed, click **[OK]** to edit the application shortcut or **[Cancel]** to cancel the process. If you click **[OK]**, the Tools tab will reflect the changes.
6. Click **[Apply]** to save changes and exit.

Remove an Application Short-Cut

To remove an application short-cut from the Add-Ins Menu,

1. From the Transcript Manager, open the Options dialog under the View menu.
2. Select the application short-cut you would like to remove and click **[Remove]**.



3. Click **[Yes]** to remove the Add-In from the Tools menu or **[No]** to cancel the deletion. If you click **[Yes]**, the Application will no longer appear on the Tools tab.
4. Click **[Apply]** to save changes and exit.

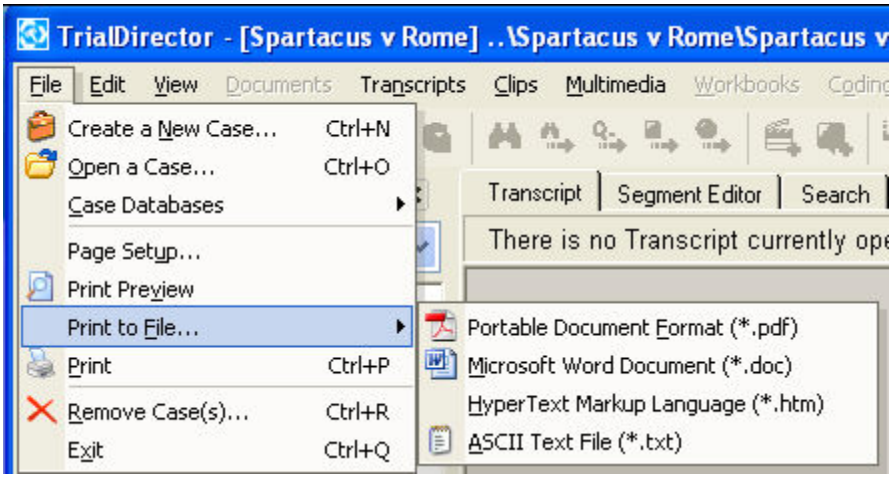
More Information:

- Options

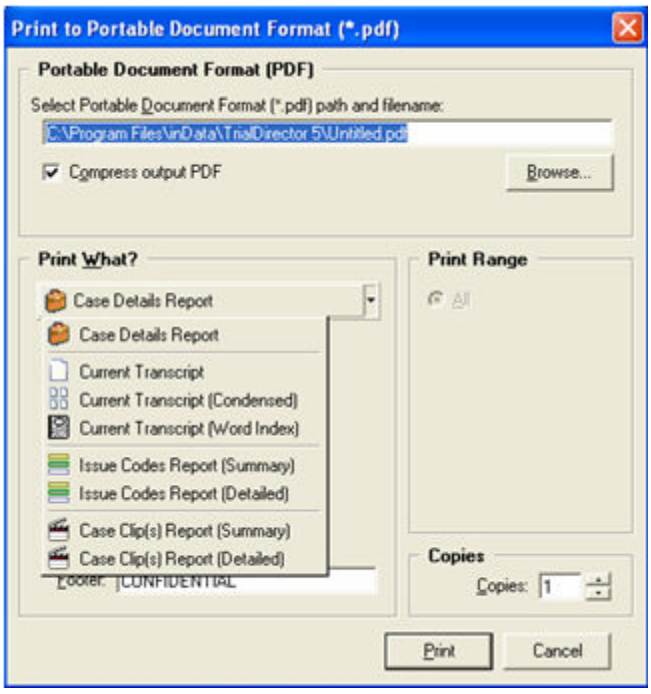
Print to a File

In addition to hard copy printing, Transcript Manager can output files to Adobe Acrobat, Microsoft Word, HTML, or plain text formats. Depending on the output type selected, you can print case reports or transcripts to files.

1. From the File menu, select **Print to File**, then select your desired format.



2. A print dialog opens, indicating your selected file type. You can specify the file name and path by editing directly in the display field, or by browsing to a desired location.



3. Click the **Print What?** drop-down menu to select the output type. Adjust the **Print Range** as desired.

Note: *The options available from the* ***Print What?*** *drop-down will change depending upon the file type you've selected.*

4. When you have completed the desired settings, click **Print**. The document will be created in the location that you specified.

More Information:

- Printing and Print Preview

Printing and Print Preview

Topics:

- Current Transcript
- Current Transcript (Condensed)
- Current Transcript (Word Index)
- Issue Code(s) Report (Summary)
- Issue Code(s) Report (Detailed)
- Case Clip(s) Report (Summary)

- Case Clip(s) Report (Detailed)

TrialDirector allows you to print and print preview:

- The Current Transcript (including Cover Page and/or Word Index)
- The Current Transcript (Condensed) (including Cover Page and/or Word Index) with either 2 pages x 2 pages, 2x3, 3x3, 3x4, 4x4 or 4x5
- The Current Transcript with Word Index and/or Cover Page (select number of columns for the Word Index)
- A Case Clip(s) Report (Summary) or a Case Clip(s) Report (Detailed). Each report may also be printed with a customizable footer. Additionally, each of the clip reports may be printed for the current clip, selected clips (using the Clips tab), or all clips in the current case.

Select **Print Preview** from the File menu to access the Print Preview options on the reports. Each of the reports (when print previewed) will have the options listed below.

Select **Print** from the File menu, or click the **[Print]** button on the Toolbar to access the Print options on the reports.

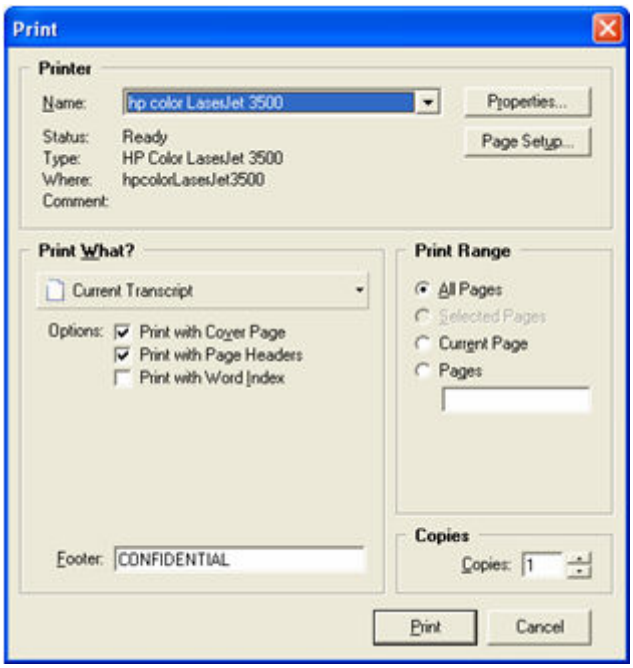
Current Transcript

When selecting the Current Transcript option, you have the option to print it with a Cover Page, Page Headers, the Word Index and report footer.

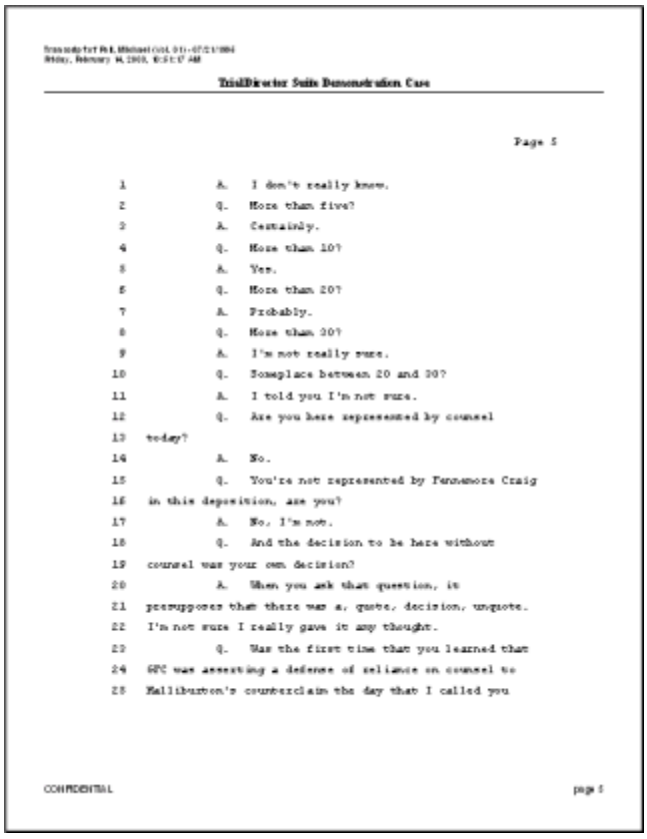
The Cover Page will display the deponent's name, volume, deposition date, any other additional comments about the deposition, and the date and time it is printed.

The transcript text prints out much like a standard transcript, but in addition to the transcript text, you will have a header section detailing the same information as the Cover Page. If you chose to have a footer print, your footer will also appear.

If you chose to have the Word Index print out, it will be at the end of the transcript with the key word or number and the page and line designations for where the key word or number exists.



Note: *The Footer field can be customized with any text phrase you wish. Clear the Footer field to prevent a footer from printing.*



TrialDirector Suite Demonstration Case

Page 5

A. I don't really know.
Q. More than five?
A. Certainly.
Q. More than 10?
A. Yes.
Q. More than 20?
A. Probably.
Q. More than 30?
A. I'm not really sure.
Q. Someplace between 20 and 30?
A. I told you I'm not sure.
Q. Are you here represented by counsel today?
A. No.
Q. You're not represented by Fennemore Craig in this deposition, are you?
A. No, I'm not.
Q. And the decision to be here without counsel was your own decision?
A. When you ask that question, it presupposes that there was a, quote, decision, unquote. I'm not sure I really gave it any thought.
Q. Was the first time that you learned that KPC was asserting a defense of reliance on counsel to Halliburton's counterclaim the day that I called you

CONFIDENTIAL

page 5

Current Transcript Example

Current Transcript (Condensed)

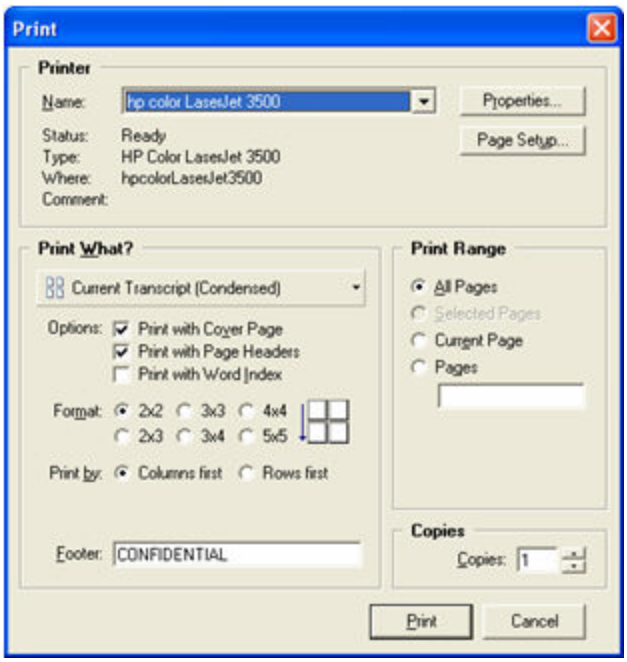
When selecting the Current Transcript (Condensed) option, you also have the ability to print it with a Cover Page, Page Headers, Word Index, the number of condensed pages per actual page, a footer, and print by columns or rows first.

You may choose the format for printing the condensed transcript from the following: 2 pages x 2 pages, 2 pages x 3 pages, 3 pages x 3 pages, 3 pages x 4 pages, 4 pages x 4 pages, or even 5 pages x 5 pages.

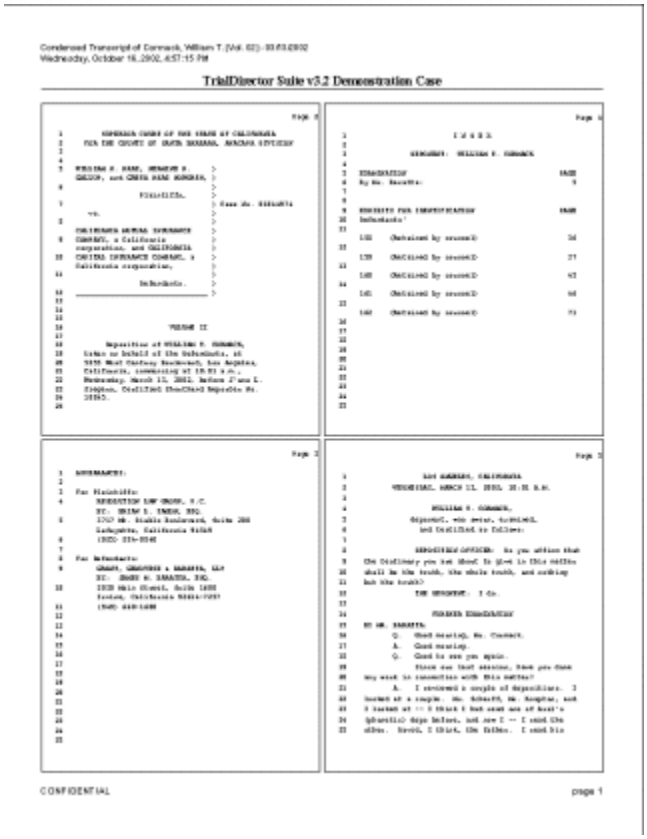
The Cover Page will display the deponent's name, volume, deposition date, any other additional comments about the deposition, and the date and time it is printed.

The transcript text prints out much like a standard transcript, but in addition to the transcript text, you will have a header section detailing the same information as the Cover Page. If you chose to have a footer print, your footer will also appear.

If you chose to have the Word Index print out, it will be at the end of the transcript with the key word or number and the page and line designations for where the key word or number exists.



Note: *Many of the condensed transcript formats produce legible transcript text, suitable for distribution.*

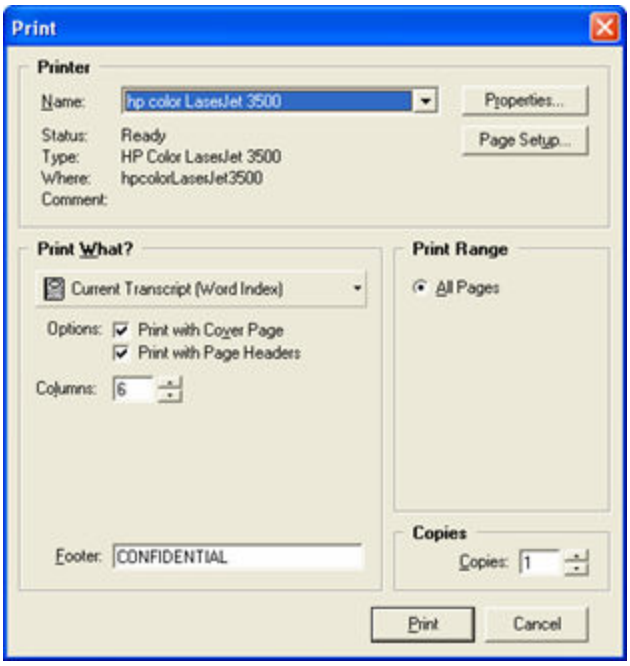


Condensed Transcript (2x2) Sample

Current Transcript (Word Index)

When selecting the Current Transcript (Word Index) option, you also have the ability to print it with a Cover Page, Page Headers, Footer, and then select the number of columns that should appear on each page for the index.

This will be a relatively short printout, as it will only contain the actual Word Index for the specific transcript. The Cover Page will display the deponent's name, volume, deposition date, any other additional comments about the deposition, and the date and time it is printed. If you chose to have a footer print, your footer will also appear.



Note: *You may find it useful to print the Word Index in a landscape orientation.*

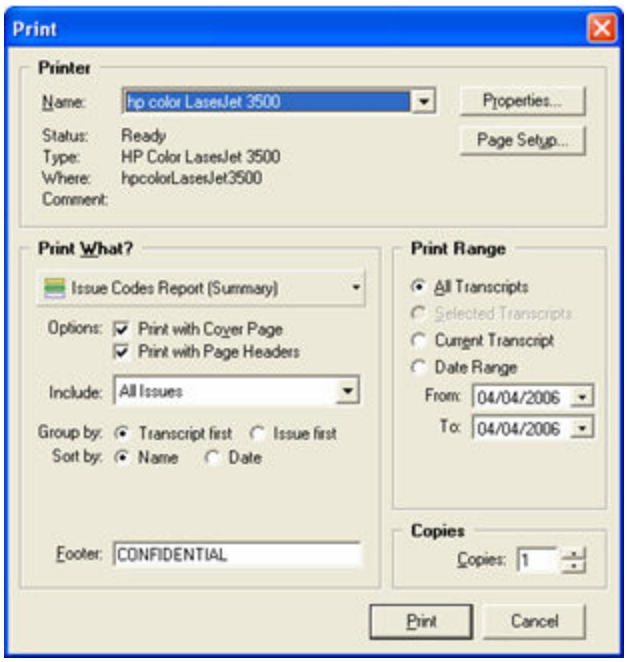
Current Transcript (Word Index) Sample

Issue Codes Report (Summary)

When selecting the Issue Codes Report (Summary) option, you also have the ability to print it with a Cover Page, Page Headers, and Footer. You can also choose to have the report cover all transcripts, selected transcripts, a single transcript, and/or a specific date range. The issues in the report can be grouped by transcript or issue, and can be sorted by name or date.

This report will list all issue codes, the DVTs they relate to, and the pertinent page/line references.

The Cover Page will display the case name and the date and time it is printed. If you have chosen to print a footer, your footer will also appear.



Case IssueCodes Summary Report
Tuesday, April 04, 2006, 6:31:20 PM

Jones v Smith

Amchin, Jess (Vol. 01) - 01/11/1999

Page 257:14 to 257:25
COOL

Page 258:04 to 258:10
TEMPERATURE

Page 258:08 to 258:13
BBIGO
TEMPERATURE
THE LETTER ABOUT DEATH

Page 259:09 to 259:13
BBIGO

Page 259:12 to 259:19
TEMPERATURE

Bontems, T.J. (Vol. 01) - 07/22/1997

Page 3:22 to 3:24
TEMPERATURE

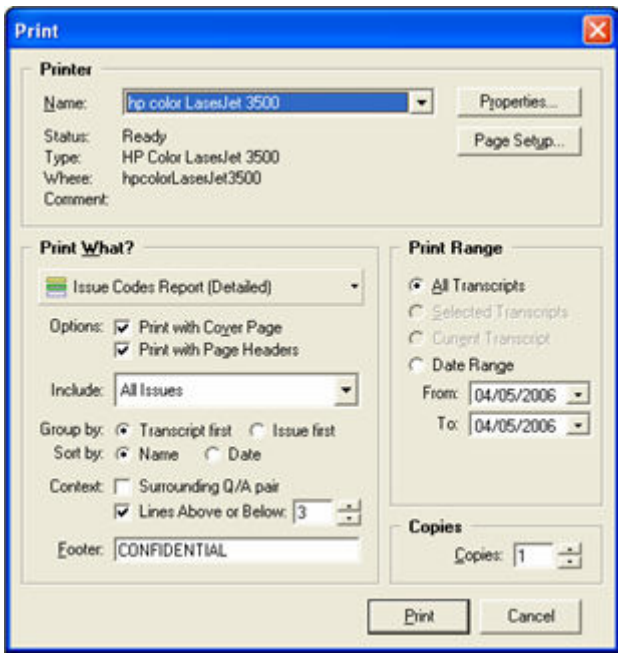
Issue Codes Report Sample

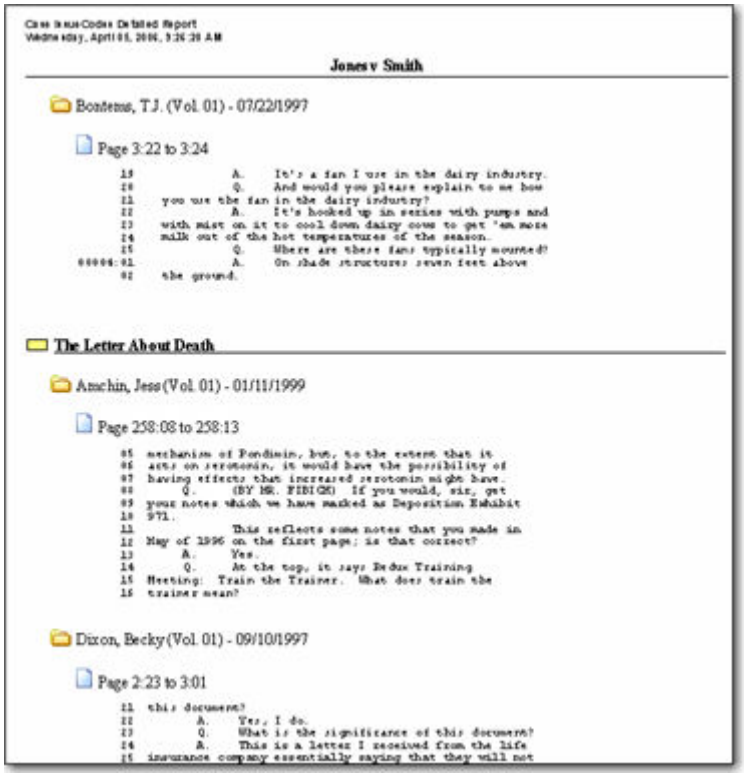
Issue Code(s) Report (Detailed)

When selecting the Issue Code(s) Report (Detailed) option, you also have the ability to print it with a Cover Page, Page Headers, and Footer. You can also choose to have the report cover all transcripts, selected transcripts, a single transcript, and/or a specific date range. The issues in the report can be grouped by transcript or issue, and can be sorted by name or date.

This report will list all issue codes, the DVTs they relate to, the pertinent page/line references and the transcript text associated with each issue.

The Cover Page will display the case name and the date and time it is printed. If you chose to have a footer print, your footer will also appear.




Jones v Smith
Bontems, T.J. (Vol. 01) - 07/22/1997
Page 3:22 to 3:24
The Letter About Death
Anschin, Jess (Vol. 01) - 01/11/1999
Page 258:08 to 258:13
Dixon, Becky (Vol. 01) - 09/10/1997
Page 2:23 to 3:01

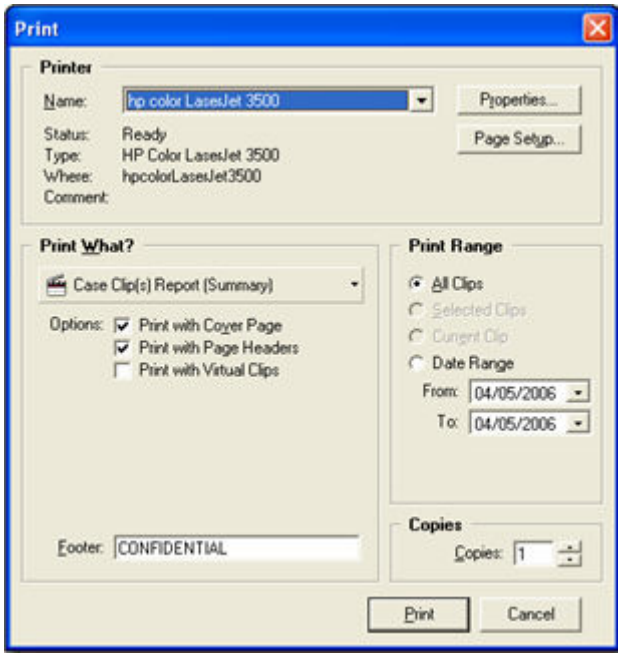
Detailed Issue Code Report Sample

Case Clip(s) Report (Summary)

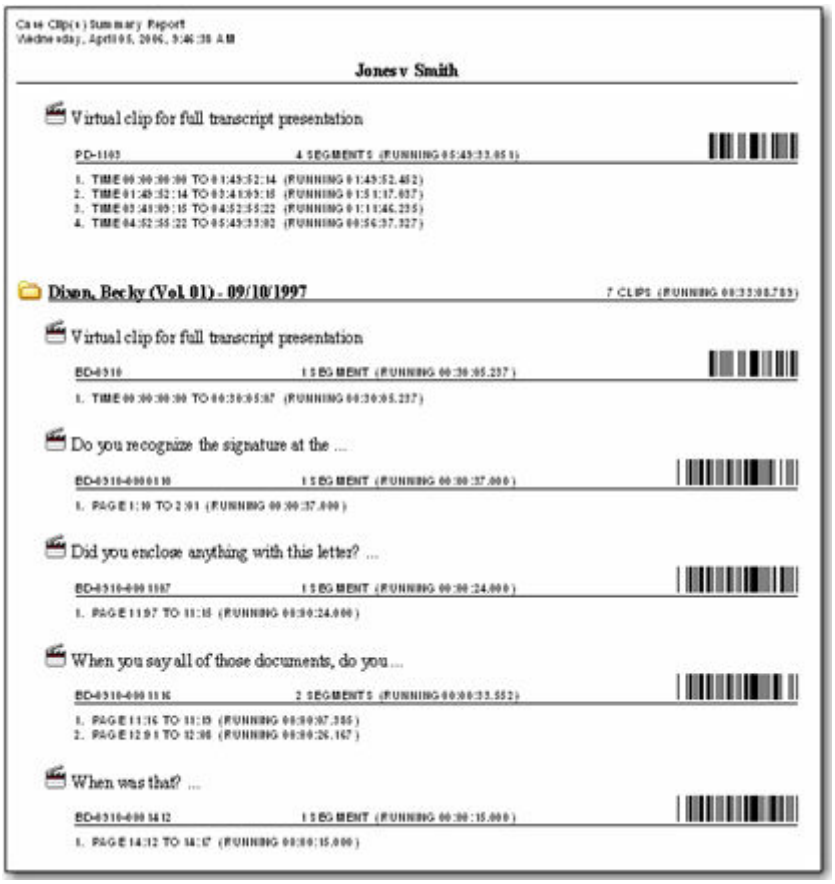
When selecting the Case Clip(s) Report (Summary), you have the option to print it with a Cover Page, Page Headers, the Virtual Clip ID, and Footer.

This report will list all DVTs, Clip IDs, Clip Descriptions, Clip Duration, Segments and Clip Barcodes.

The Cover Page will display the case name and the date and time it is printed. If you have chosen to print footer, your footer will also appear.



Note: *Print Case Clips Report (Summary): This report type is designed to print for 3-hole punched paper. These reports can then be added to a trial notebook. This report sample is zoomed for effect.*


Jones v Smith
Virtual clip for full transcript presentation
Dixon, Becky (Vol. 01) - 09/10/1997
Virtual clip for full transcript presentation
Do you recognize the signature at the ...
Did you enclose anything with this letter? ...
When you say all of those documents, do you ...
When was that? ...

Case Clips Report Sample

Case Clip(s) Report (Detailed)

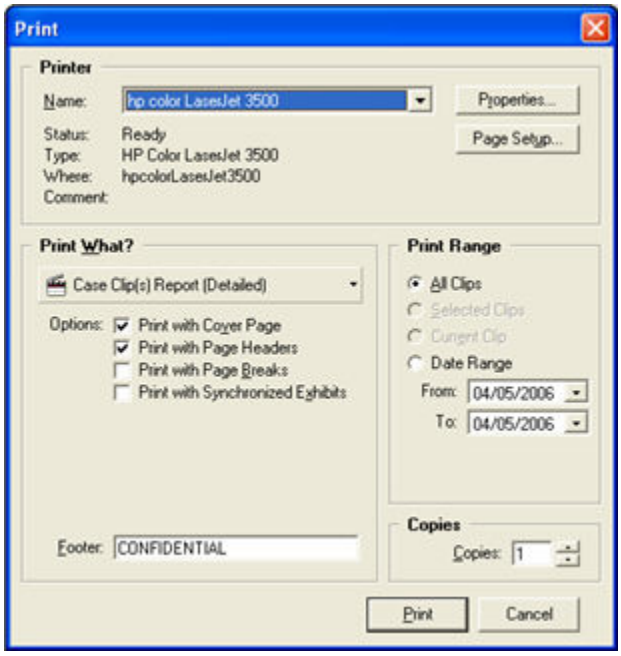
When selecting the Case Clip(s) Report (Detailed), you have the option to print it with a Cover Page, Page Headers, Page Breaks, Synchronized Exhibits, and Footer.

This report will list all DVTs, Clip IDs, Clip Descriptions, Clip Duration, Segments, Clip Barcodes, and the transcript text associated with each Segment.

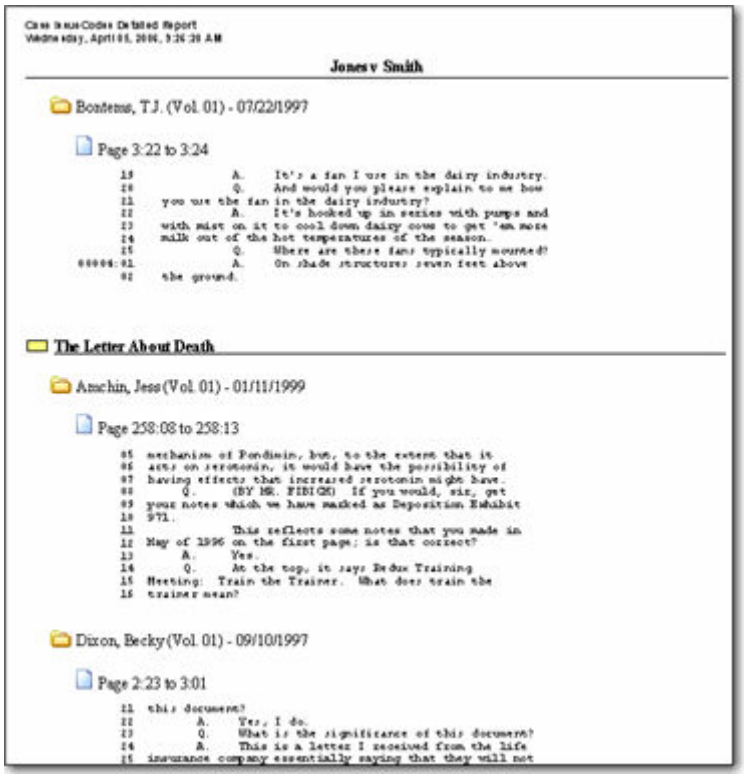
The Cover Page will display the case name and the date and time it is printed. If you chose to have a footer print, your footer will also appear.

If you chose to print Page Breaks, each clip will be printed on its own page.

If you chose to print Synchronized Exhibits, it will also print the barcode and Object ID for each of the synchronized exhibits associated with the clip.



Note: *Print Case Clips Report (Summary): This report sample is zoomed in to detail the Attached Exhibit and text excerpt entries.*


Jones v Smith
Bontems, T.J. (Vol. 01) - 07/22/1997
Page 3:22 to 3:24
A. It's a fan I use in the dairy industry.
Q. And would you please explain to me how
you use the fan in the dairy industry?
A. It's hooked up in series with pumps and
with mist on it to cool down dairy cows to get 'em more
milk out of the hot temperatures of the season.
Q. Where are these fans typically mounted?
A. On shade structures seven feet above
the ground.
The Letter About Death
Amchin, Jess (Vol. 01) - 01/11/1999
Page 258:08 to 258:13
mechanism of Pondimin, but, to the extent that it
acts on serotonin, it would have the possibility of
having effects that increased serotonin might have.
Q. (BY MR. FIDLER) If you would, sir, get
your notes which we have marked as Deposition Exhibit
971.
This reflects some notes that you made in
May of 1996 on the first page; is that correct?
A. Yes.
Q. At the top, it says Redux Training
Meeting: Train the Trainer. What does train the
trainer mean?
Dixon, Becky (Vol. 01) - 09/10/1997
Page 2:23 to 3:01
this document?
A. Yes, I do.
Q. What is the significance of this document?
A. This is a letter I received from the life
insurance company essentially saying that they will not

Detailed Case Clips Report Sample

More Information:

- Print a Transcript

Remove Digital Video Transcript(s)

1. To remove Digital Video Transcript(s), select the DVT(s) you would like to remove by doing one of the following:
    - To remove one DVT, click on the DVT you would like to remove in the Transcript Explorer.
    - To remove multiple DVT's, set the **View by** selector to Transcripts in the Transcript Explorer. Click in the box next to the transcripts you would like to remove.
2. When you have selected the DVT(s) you would like to remove, select **Remove Selected Digital Video Transcript(s)** from the Transcripts menu.

The DVT's are removed from the case.

More Information:

- Digital Video Transcript
- Import a Digital Video Transcript
- Open a Digital Video Transcript
- View a Digital Video Transcript
- Change Digital Video Transcript Properties
- Close a Digital Video Transcript
- Remove Digital Video Transcripts

Change CDs

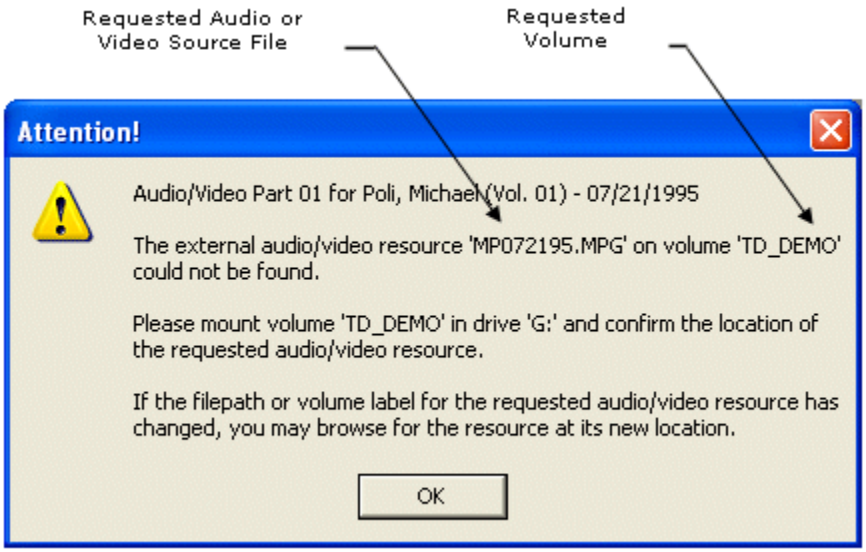
1. If the requested volume is on a CD-ROM, mount the requested volume.
2. Click **[OK]**. A navigation window will appear.

3. Do one of the following:

    - Locate and select the requested multimedia file and click **[Open]** or double-click the filename. The multimedia for the DVT will be opened.
    - Click **[Cancel]** if the requested multimedia file is not on your computer. A message window will appear, informing you that the multimedia for the DVT will not be available. Click **[OK]**.

Note: *Change CDs only when this dialog box appears.*

If you attempt to access a Digital Video Transcript and TrialDirector cannot locate the multimedia source file needed, the following window will appear:


Requested Audio or Video Source File
Requested Volume
Attention!
Audio/Video Part 01 for Poli, Michael (Vol. 01) - 07/21/1995
The external audio/video resource 'MP072195.MPG' on volume 'TD_DEMO' could not be found.
Please mount volume 'TD_DEMO' in drive 'G:' and confirm the location of the requested audio/video resource.
If the filepath or volume label for the requested audio/video resource has changed, you may browse for the resource at its new location.
OK

Note: *To prevent TrialDirector from prompting you to locate audio/video resources, we recommend that you to copy multimedia source files to a local hard disk or linked drive.*

More Information:

- Digital Video Transcripts
- Turn Closed Captioning On or Off
- Turn Audio On or Off
- Change CDs
- Disconnect the Multimedia Stream
- View Multimedia Properties
- Modify Multimedia Source Paths

Coding

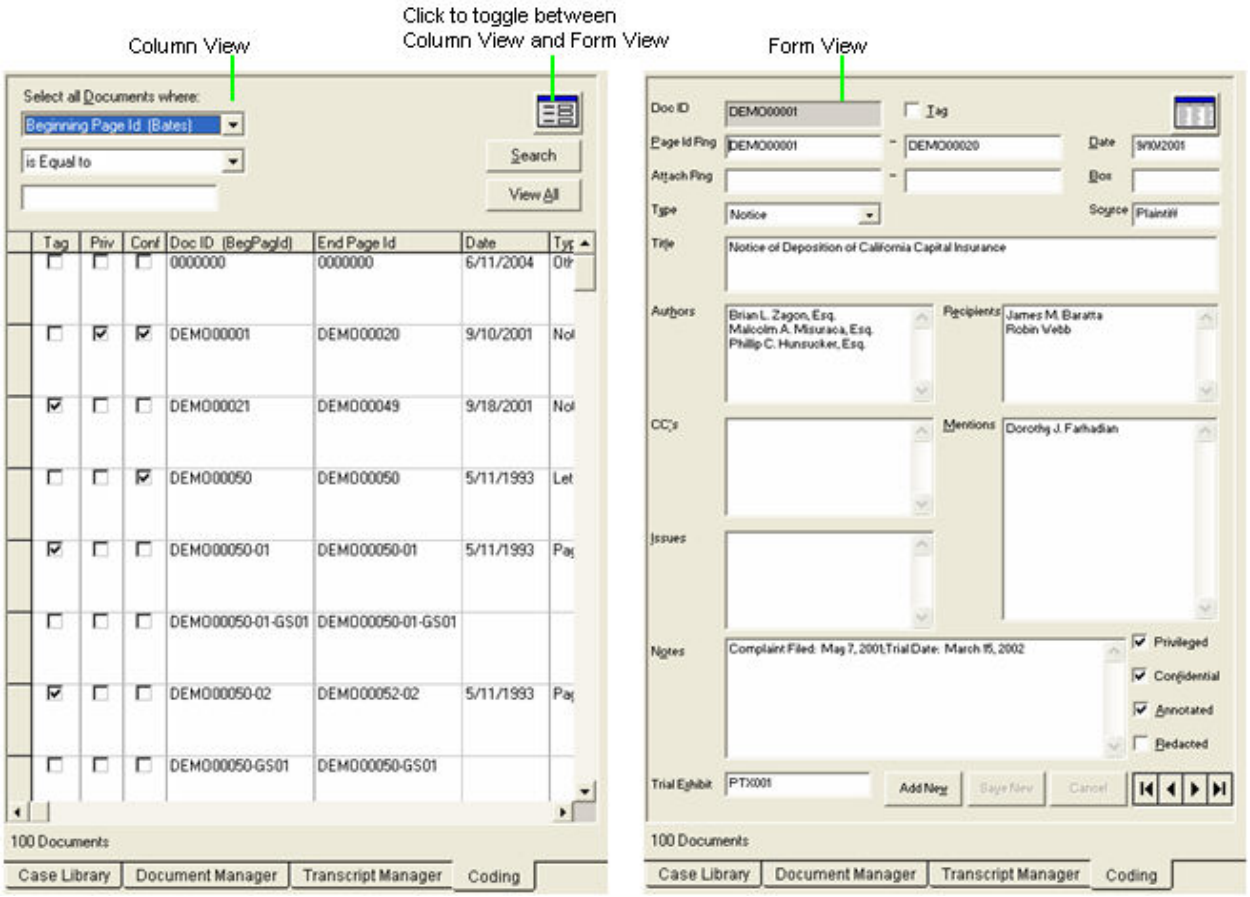
Coding Database

Coding Database

The coding database is a repository of information. Databases use tables made up of rows and columns to store information in a structured manner and provide access to that information. TrialDirector allows you to input or import coding information into your case.

Note: *The coding database (*.mdb) is secured in addition to the *.cms and items database (*.mdb) when a secure case is created.*

Select the Coding tab to display coding information. Coding data can be displayed in either a Column View (displays multiple records) or a Form View (displays a single record). You can also choose to display the associated document, or view just the coding information, by toggling the Item Viewer command under the View menu.



Note: *You can disable the Item Viewer in order to view the Coding Database in full view. Simply clear the* ***Item Viewer*** *option under the View menu. Use* ***[SHIFT]*** *+* ***[F5]*** *as a shortcut key, as well.*

More Information:

- Coding Database
- Synchronize from Items Database
- Import Coding Data
- Export Coding Data
- Manually Entering Coding Data
- Searching Coded Database
- Using Advanced Query Builder
- Reviewing Coding Data
- Send Results to Workbook
- Send Selected Items to Workbook
- Remove Selected Results

Import Coding Data

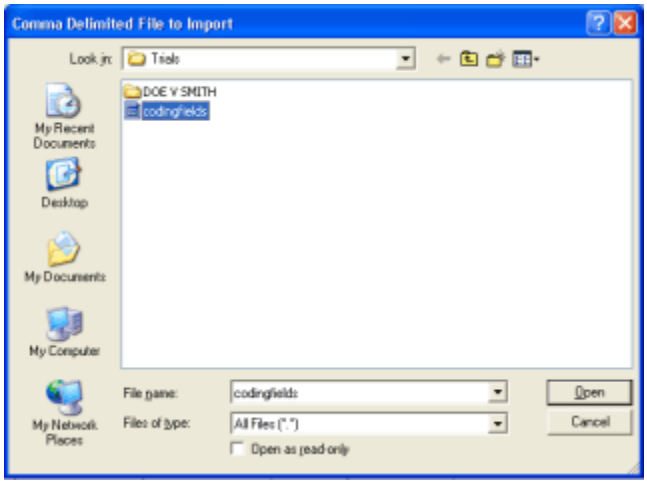
Coding information from a third-party database (i.e. CT Summation Enterprise/iBlaze, Concordance) can be imported into your TrialDirector case.

The coding information must meet the following requirements:

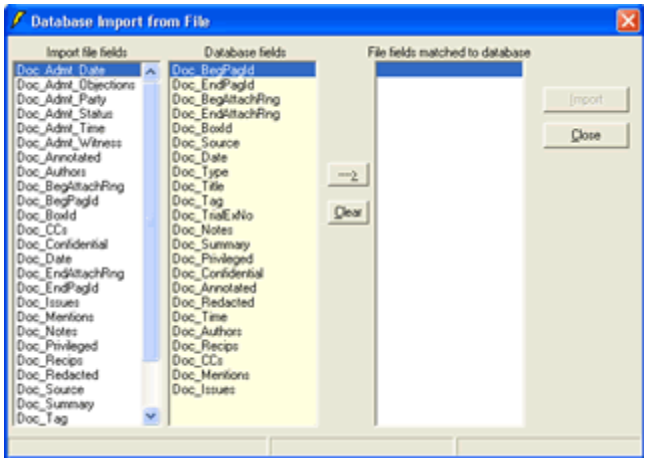
- Comma Delimited ASCII Text File
- Use quotes (,"data",) , carets (,^data^,), or nothing (,data,) as a text qualifier.
- Field Names must exist as the first record

To import 3rd party coding date perform the following steps:

1. Select the **Import Coding Data** from the Coding menu. The following screen will appear:



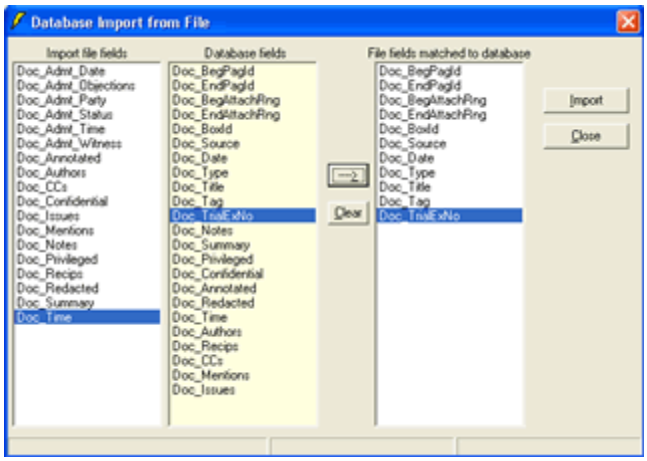
2. Select the comma delimited text file you wish to import and click **[Open]**. The following screen will appear:



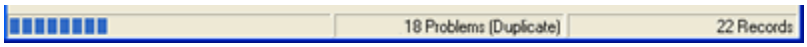
3. TrialDirector will read the first record of the input file to determine the **Import File Fields**. These fields are listed in the left side column in the screen above. The available **Database Fields** are listed in the center column. Finally, the **File Fields Matched to the Database** are listed on the right column. The user needs to match or map the file fields from the import file to the available fields. To perform this task, perform the steps below:

   a. Select the first Import File Field.
   b. Find the appropriate field within the listed Database fields that most closely matches the Import File Field.
   c. Click the arrow button to move that field to the File Fields Match to Database column.
   d. This action will cause the moved item to disappear from the Import File Fields column.
   e. Repeat these steps until all the fields in the Import File Fields have been mapped. Any fields remaining will not be imported.

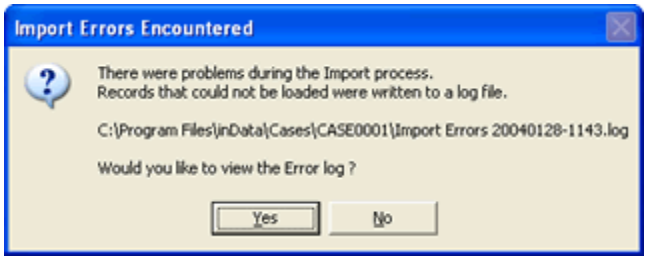
4. When all of the fields have been mapped, the import dialog will look similar to the once below. Click **[Import]** to start the process. The import process time is determined by the amount of data included in the input file.



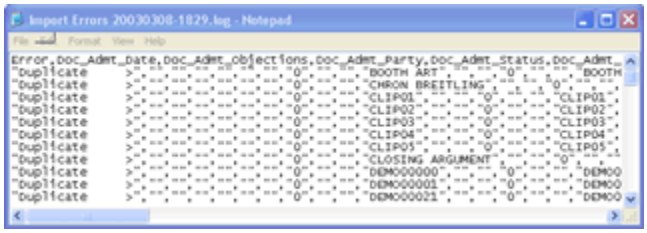
5. During the import process, you will see a progress indicator along the bottom of the dialog window (See Below). Any duplicate records will be indicated as well as the number of actual records processed.



6. If problems, such as duplicate records are encountered, you will be prompted to review those items.


Import Errors Encountered
There were problems during the Import process.
Records that could not be loaded were written to a log file.
C:\Program Files\inData\Cases\CASE0001\Import Errors 20040128-1143.log
Would you like to view the Error log ?
Yes
No

7. Clicking **[Yes]** to the dialog above will open a text file in Notepad that will document any errors. The most common errors are duplicate records.



8. Finally, click **[Close]** on the import dialog to update the coding database and return to TrialDirector.
9. Clicking on the **Coding** Item Type tab will display the newly added records.

More Information:

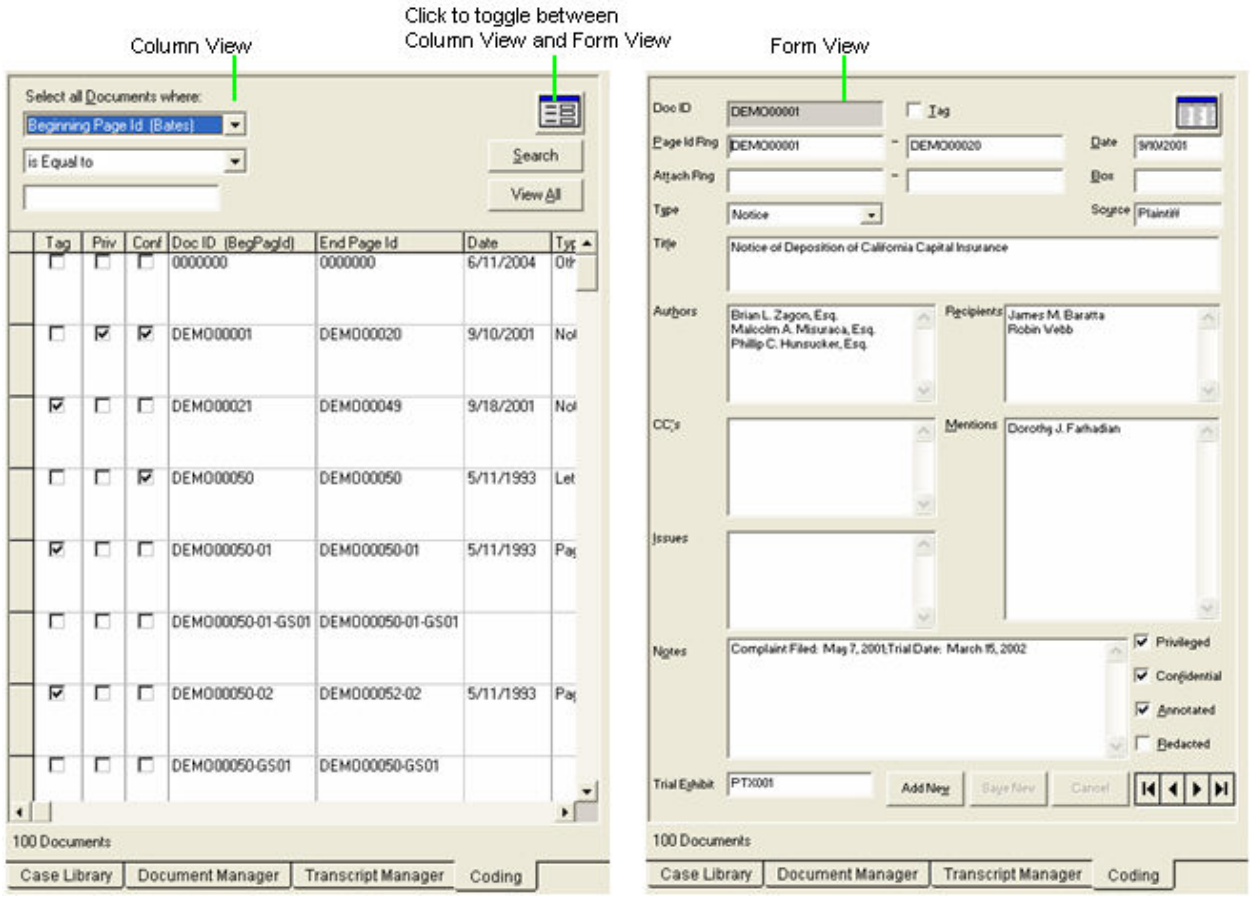
- Coding Database

Manually Entering Coding Data

You can manually enter coding data for new or existing records using one of two methods:

- The Column View displays multiple records at once in a grid format, which enables you to search for records, sort records, and quickly update fields for one or more records.
- The Form View displays one record at a time, which enables you to view all of the fields for a particular record at once. Some users also find adding and editing coding data easier using this view.

Note: If you edit the Trial Exhibit No. or the Title in either of these views, TrialDirector will update this information in the Item Properties in Case Explorer as well.



Column View

To open the Column View, do one of the following:

- On the **Coding** menu, click **Column View (Multiple Records)**.
- Clickthe button in the top right corner or press **SHIFT+ F3** to toggle the view.

To add a new record:

1. Scroll to the bottom of the list to the blank row marked with an asterisk.
2. Enter the Doc ID (BegPageID) for the new record.
3. Enter additional coding data in the appropriate fields.
   The record type changes to a new record (represented with a pencil icon) while you enter the coding data.
4. To add the new record to the database, click off the new record.

To sort records:

- Click any field heading at the top of the Column View to sort the list. Click again to reverse the sort order.

Form View

To open the Form View, do one of the following:

- On the **Coding** menu, click **Form View (Single Record)**.
- Clickthe button in the top right corner or press **SHIFT+ F3** to toggle the view.

To add a new record:

1. Click the **Add New Record** button at the bottom of the form.
2. In the **Page Id Rng** fields, enter the beginning Page ID and the end Page ID.

3. Complete the remaining fields as needed.
4. Click **Save New Record** to add the new record to the database.
   The Form View will be refreshed and ready to add a new record.

To exit Add mode and review coding records:

1. Click the **Review Records** button to switch to Review mode.
2. Use the navigation button on the lower right-hand corner of the view to move between records.

More Information:

- Coding Database

Using OCR Text to Populate Coding Database

Topics:

- Browsing Full-Text OCR from Coding tab
- Add Full-Text OCR to Coding Database record
- Append Full-Text to Coding Database record

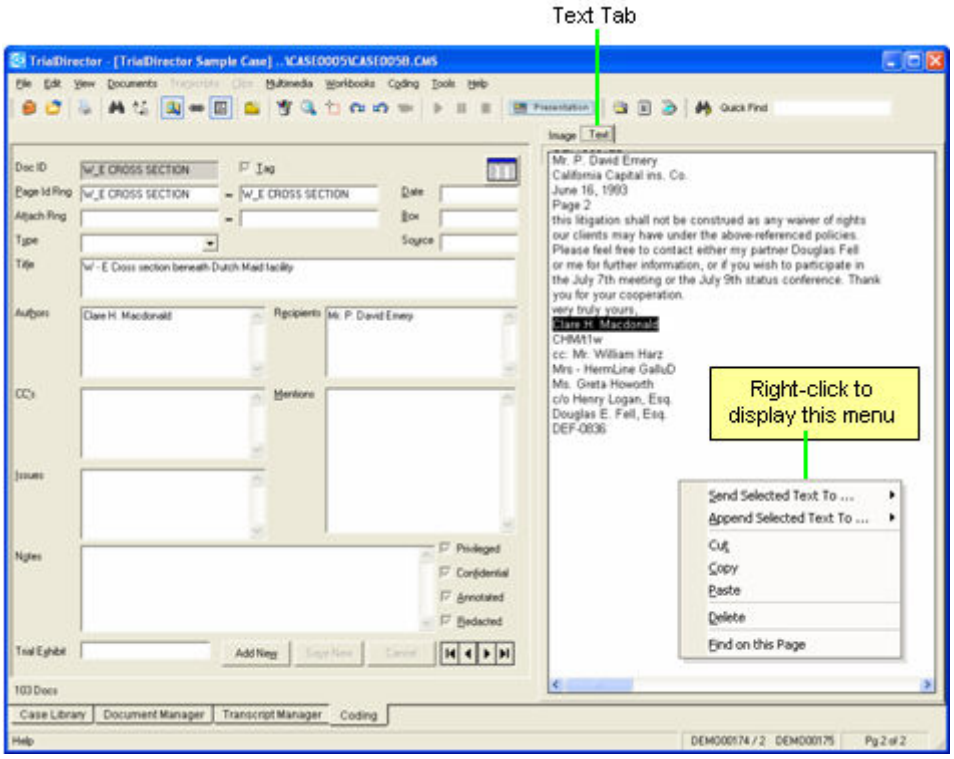
TrialDirector has a feature that bridges the gap between coding and full-text OCR. TrialDirector users can select full-text OCR data and send it directly to the associated coding record with just a few mouse clicks.

Browsing Full-Text OCR from Coding Tab

In order to effectively use this feature it is important to become acquainted with viewing full-text OCR from the TrialDirector Coding tab. Follow the steps below to learn how to view full-text OCR from the Coding tab.

1. Prior to browsing full-text OCR, make sure that all items from the images database have been moved to the coding database. This will ensure that all image items (with OCR text) are available on the coding tab. Use the **Synchronize Coding from Item(s) Database** from the Coding menu. This synchronization option will add a record to the coding database for every document in the images database.
2. Make sure that third-party images and OCR text have been imported. The more images that have been processed will mean more items can be reviewed.

3. From the Coding tab, select a document and display the Text tab.



Note: *If reviewing coding records from the Form View, use the View / Edit Full Test For This Page option under the Items menu to display the window shown above.*

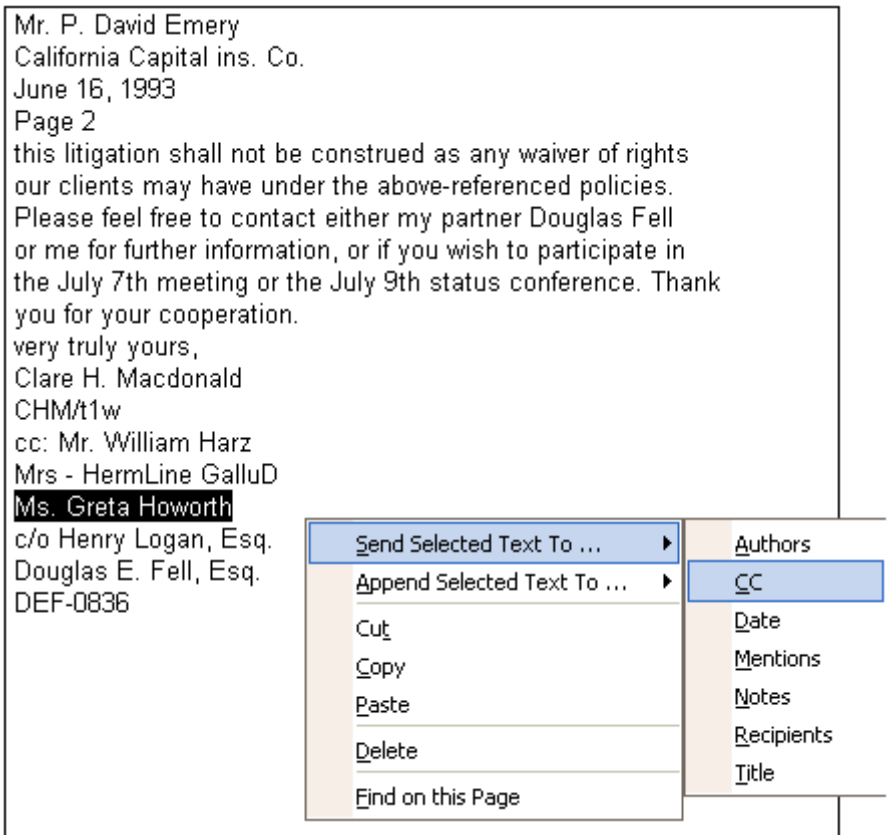
4. Because the coding records are on a document level, full-text additional pages of the document can be viewed by using the Previous and Next buttons.

Add Full-Text OCR to Coding Database Record

To add full-text OCR to a coding database record, follow the steps below:

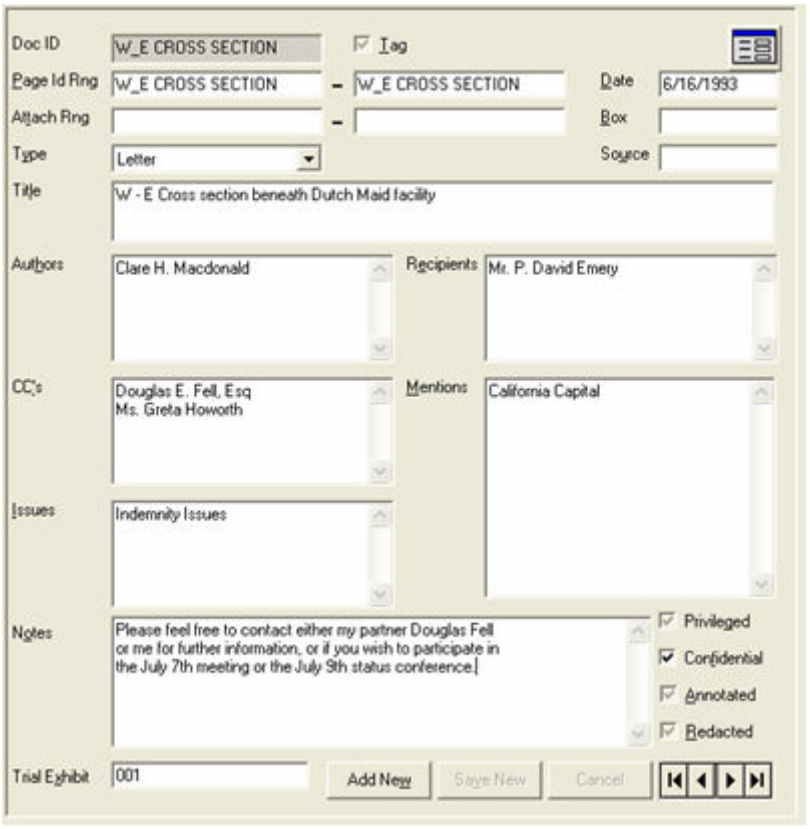
1. In the Text view window, highlight the text you wish to add to the coding database. Right-click, choose **Send Selected Text to**, and then select the appropriate coding field. Below is an example of a name being added to the **CC:** field.

Note: *If additional text is sent to the same coding field, for example, adding an additional CC name, select the* ***Append Selected Text To*** *option in the shortcut menu. Otherwise, the selected text will overwrite any entry that already exists in the coding field.*



2. The text is then added to the selected coding field. If the coding view was set to the column view, it will automatically change to Form View. The Form View displays all coding fields for a single record, making this task easier.

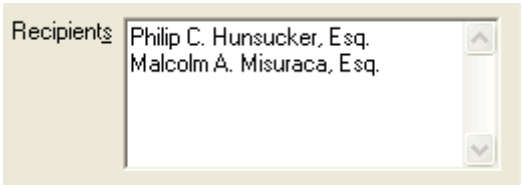
3. Repeat this step for any other necessary coding fields. Please note that only objective coding fields can have full-text OCR added to them. Subjective fields, such as Type need to be manually set. When all available coding fields have been updated, the coding record may look similar to the one below.



Append Full-Text to Coding Database Record

When updating a coding record with full-text OCR data, some fields (Recipients, Authors etc.) may need to have multiple entries. The append option allows additional entries to be added to a single coding record field. Perform the steps below to append full-text to a populated coding field.

1. Select the text you wish to add to the coding field.
2. Right-click, select the **Append Selected Text To** option, then the appropriate field. The next text phrase will be added to selected coding field. Multiple entries are listed separately, as shown below.

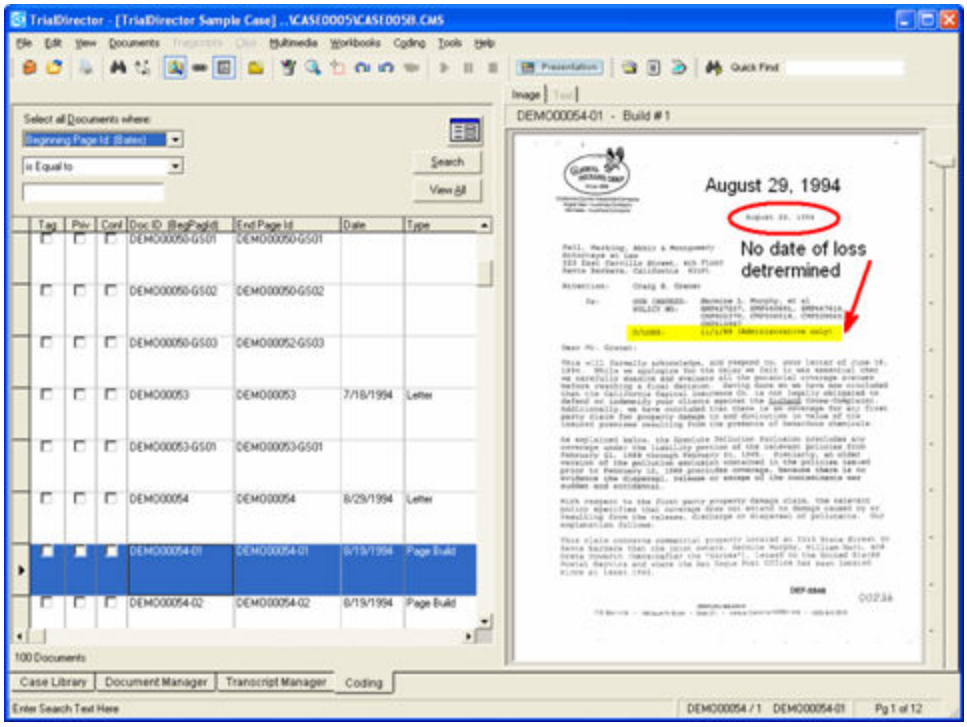


More Information:

- OCR Full Text

Reviewing Coding Data

When the coding database document IDs are synchronized with the document IDs from the Items database, reviewing images along with coding data is very easy. Displaying both the coding data (column view) and the image viewer in TrialDirector at the same time, allows one to review coding data and the associated image at the same time. As show below, clicking on the Doc ID for the coding record will display the associated image.



Reviewing coding data along with the associated images make it easy to update coding info, annotate images, search for documents etc.

More Information:

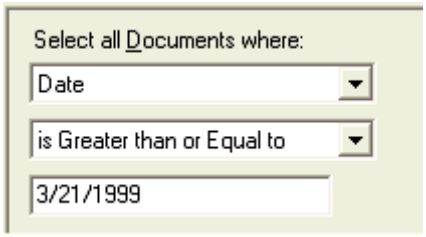
- Coding Database

Searching Coded Database

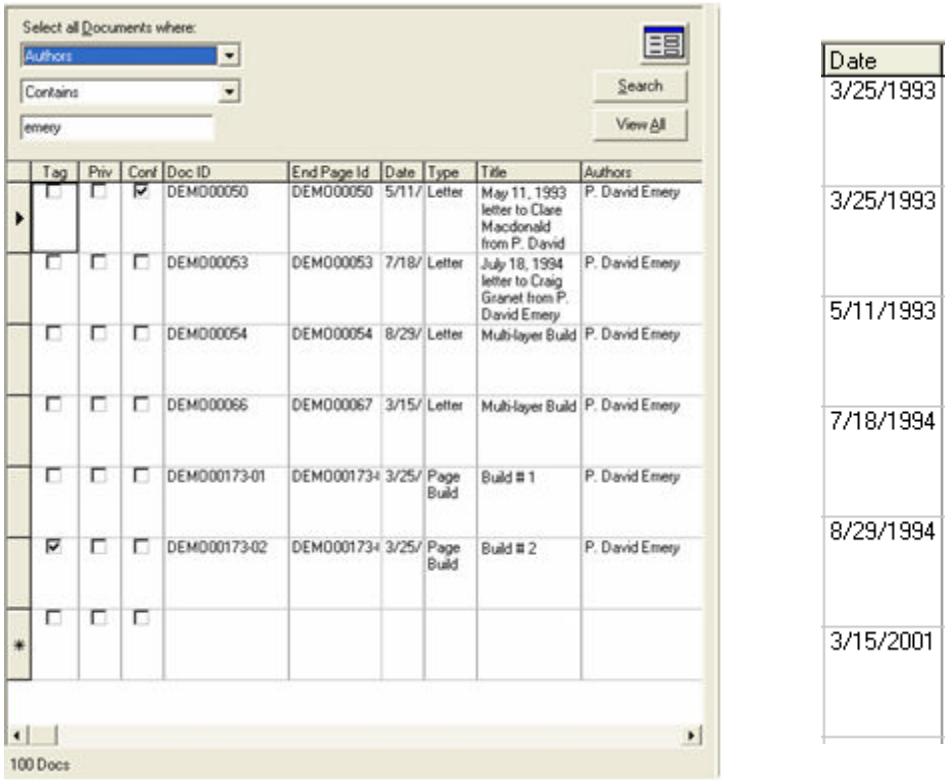
After you have coding information in your database you can conduct searches. The "Select all documents where" option when viewing coded data in the Column View gives you the ability to search in any of the specific fields listed.

To perform a search of the coded data, perform the following steps:

1. Select which database field you wish to search on from the first drop-down list.
2. Select the search operator (is equal to, is greater than) from the second drop-down list.
3. Type in the search string into the text box. A typical search would be similar to the one shown below.



4. Click the **[Search]** button on the right side of the screen. The search results will be displayed in the coding database column view, as shown below. You can now sort the field you searched upon to view the items in ascending order. (for example, sort by date)



After reviewing the search results, you can click the **[View All]** button to return to the all coded items display within the column view. Optionally, you can **Send Results to a Workbook**.

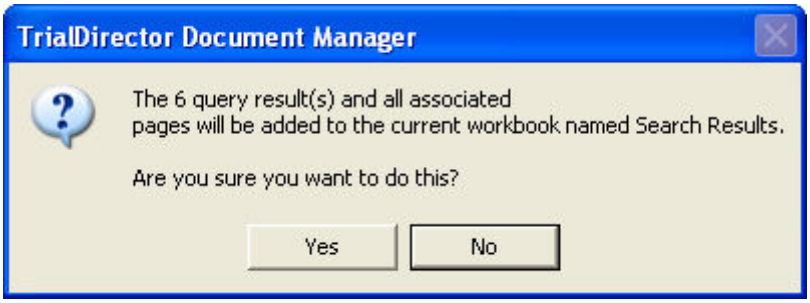
More Information:

- Coding Database

Send Search Results to Workbook

This option allows users to send the results from a search query to be sent to the currently selected workbook.

1. In order for this option to be available, first perform a search on the coding database.
2. Make sure that a workbook is selected (highlighted) on the Case Library tab.
3. Select **Send Result(s) to Workbook** from the Coding menu. The following dialog will appear:


TrialDirector Document Manager
The 6 query result(s) and all associated
pages will be added to the current workbook named Search Results.
Are you sure you want to do this?
Yes
No

4. Click **[Yes]** to send the results to the current workbook.

Note: *All associated pages of multi-page documents listed within the coding database search results will be added to the current workbook.*

More Information:

- Coding Database

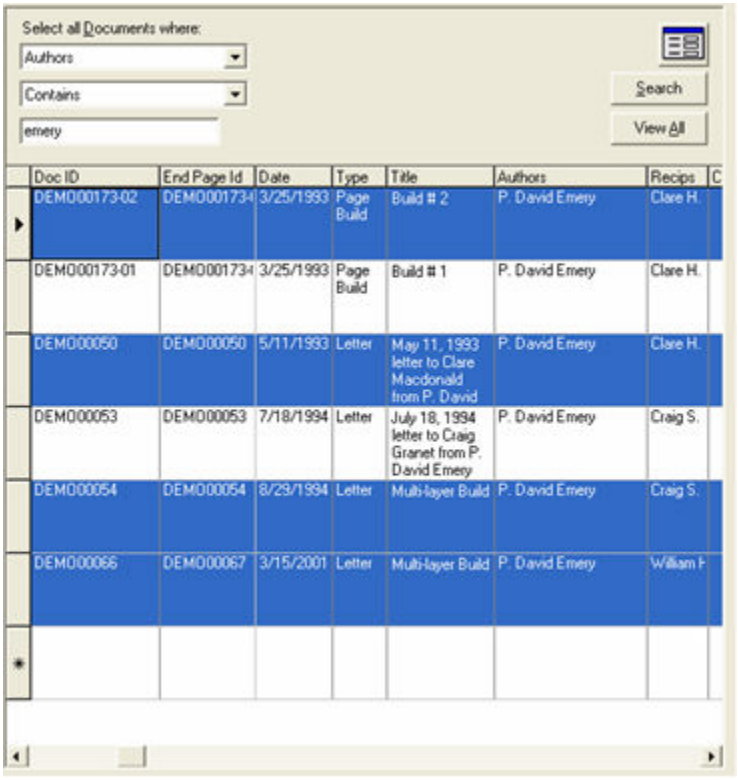
Send Selected Items to Workbook

This option allows users to send selected items within the coding database to the currently selected workbook.

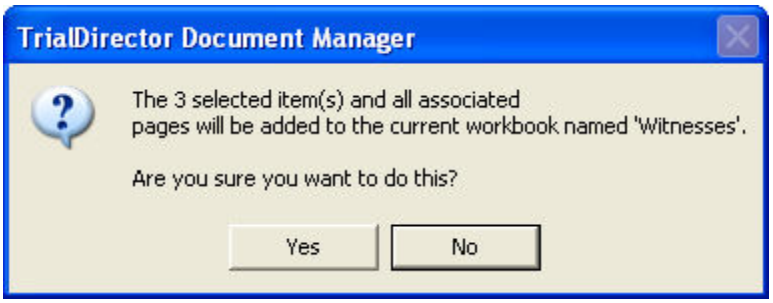
1. Make sure a workbook has been selected. You can display the Workbooks Explorer by clicking the Case Library tab.

Note: *This operation can be used either on a search results list or an all coded items list.*

2. Click the record selector on the left side of the database grid to select the records you wish to send to the workbook. You can use **Ctrl-Click** to select multiple, non-sequential items. See below:



4. Select **Send Selected Item(s) to Workbook** from the Coding menu. The following dialog will appear:


TrialDirector Document Manager
The 3 selected item(s) and all associated pages will be added to the current workbook named 'Witnesses'.
Are you sure you want to do this?
Yes
No

4. Click **[Yes]** to send the selected results to the current workbook.

More Information:

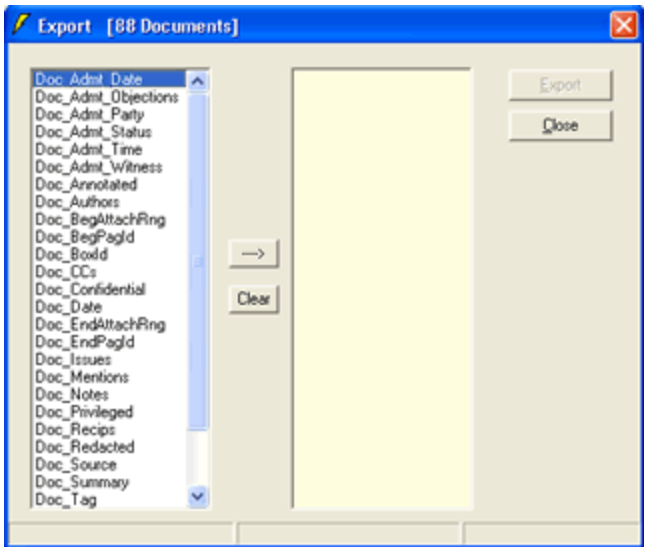
- Coding Database

Export Coding Data

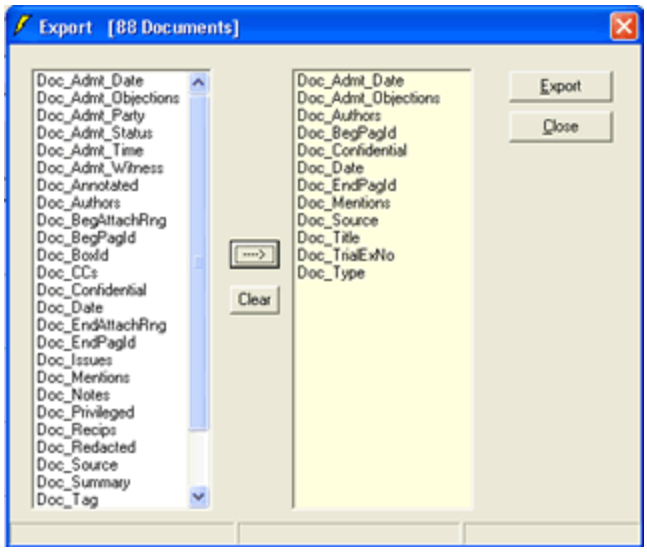
Coding information from TrialDirector can be exported for use with third party programs, such as CT Summation iBlaze™.

To export TrialDirector coding data, follow the steps below:

1. Select **Export Coding Data** to file from the Coding menu. The following screen appears:



2. Select the fields from those fields listed on the left-hand side. Click the arrow button ---> to move the database field you wish to export from the left column to the right column. The following would be an example of fields you could select.



3. Click **[Export]** to continue. The following screen appears:

4. Select a file name and click **[Save]** to complete the export process.

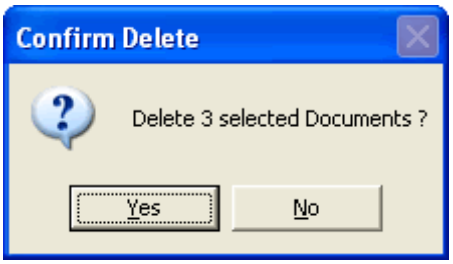
More Information:

- Coding Database

Remove Selected Results

Unwanted coding records can be removed from the database by first selecting the records. Either:

1. Press **[Delete]** on the keyboard or use the **Remove Selected Result(s)** from the Coding menu. The following dialog will appear:



2. Click **[Yes]** to delete the selected coding documents.

Note: *If the document exists in both the coding database and the items database, it is only deleted from the coding database.*

More Information:

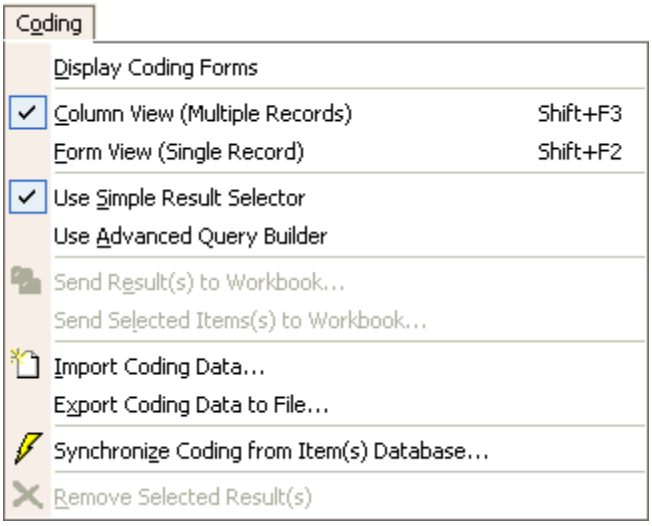
- Coding Database

Synchronize from Items Database

In TrialDirector, you can synchronize the contents of the Document Manager Case Explorer with the Coding database. This is very useful when a large number of items have been added to the documents (Items) database. Once the Coding and Items databases are synchronized, you can review both the coding data and the image at the same time, and edit the coding information.

To synchronize from the databases, perform the following steps:

1. On the Coding tab, select **Synchronize Coding from Item(s) Database...** from the Coding menu.



2. TrialDirector will begin to process the Items Database information and then populate the Coding Database. The time to process the database information depends on the amount of records in the Items Database.
3. The following Items Database fields are imported into the corresponding Coding Database fields.

Items Database	Coding Database
Doc ID (Parent Page/Page 1)	Doc ID (BegPagId)
Doc ID (Last Page)	Doc ID (End Page Id)
Description	Title

More Information:

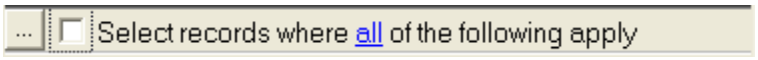
- Coding Database

Using Advanced Query Builder

The Coding Database allows you to use more advanced search strings to locate specific Items.

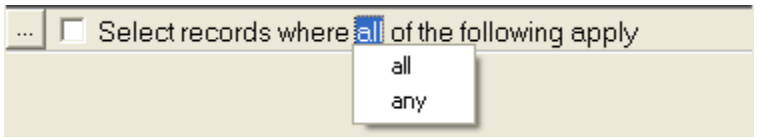
1. Select **Use Advanced Query Builder** from the Coding menu.

The advanced query search area appears in place of the simple search area, as shown below.

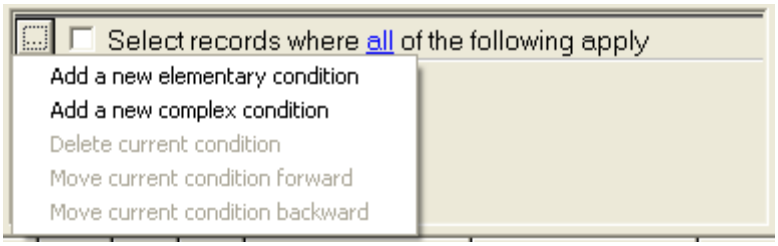


Note: *Documented below are the steps to search a coding database using elementary conditions. Using one or more elementary conditions will work for most users. Using multiple elementary conditions allows one to search multiple database fields.*

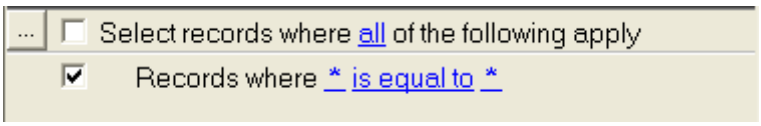
2. Click on the highlighted **All** link, the following list appears:



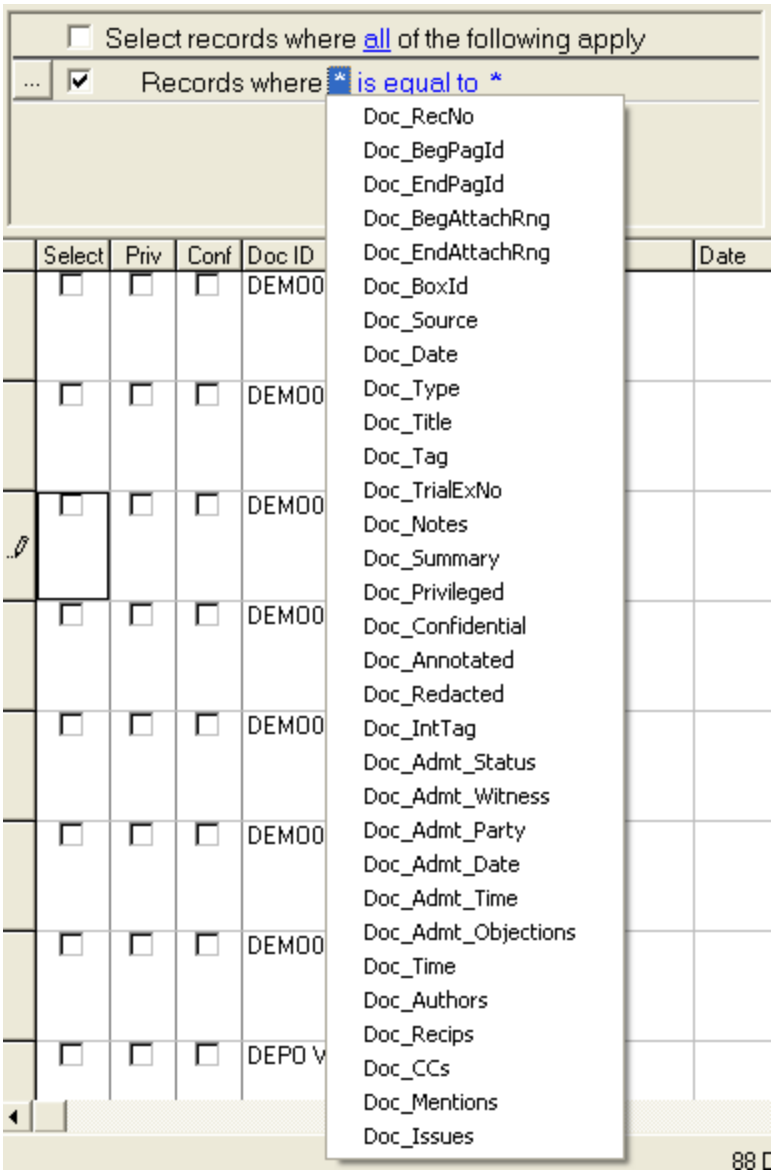
3. Select your search condition (all, any etc.)
4. Selecting the box to the left of the search string gives you the following advanced options.
5. Select **Add a New Elementary Condition** from the list.


Select records where all of the following apply
Add a new elementary condition
Add a new complex condition
Delete current condition
Move current condition forward
Move current condition backward

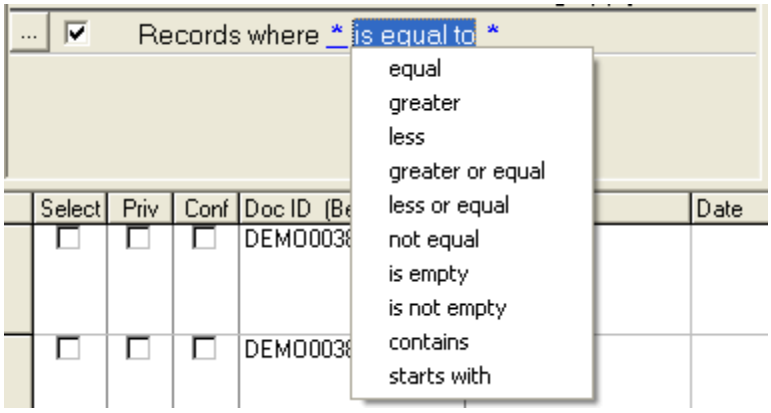
6. Search by adding a new elementary condition gives you the following options:



7. Clicking on the first asterisk ***** will display a list of the coding database field names. Shown Below:



8. Select one field name, it will be added to the search string.
9. Clicking on the highlighted **is equal to** link will display the following search operator options:



10. Clicking on the second asterisk ***** link will allow you to enter in specific search string text you would like to complete your search.

In the example below, using multiple elementary conditions to search the coding database within TrialDirector Suite Demo Case will result in finding specific documents needed.

Select records where all of the following apply
Records where Document.Date is greater than or equal to 11/29/1999
Records where Document.Title contains Summary Judgment
Records where Document.Authors contains Judge Davis

In this case, there are a few Summary Judgment related documents. Specifically needed, is the Summary Judgment from Judge Davis dated after 11/29/99. We will use 3 separate elementary search conditions and make sure all of the conditions are applied to the search. The resulting search finds the exact one document needed. (show below) The one item in the search results can be sent to a workbook to print, add to an Exhibit Outline, or present at trial.

More Information:

- Coding Database

Presentation

Introducing Presentation Mode

Effective Courtroom Presentation

TrialDirector thrusts courtroom presentation from the "marker board and easel" exhibit presentation of the past to the powerful multimedia presentation of the future. TrialDirector's Presentation mode takes the courtroom presentation of case exhibits to a new level by offering side-by-side exhibit comparison, on-screen annotation tools, and multiple zoom capabilities. Exhibits on the presentation display that have been annotated during trial can be printed or saved as separate exhibits. Exhibit recall is made quick and easy using barcodes, scripts, macros, and keyboard commands. And, TrialDirector's dual screen capability offers more control than ever, allowing exhibits to be dragged and dropped onto the presentation display. With a broad range of capabilities, TrialDirector gives you the edge you need to deliver courtroom presentations with winning impact.

More Information:

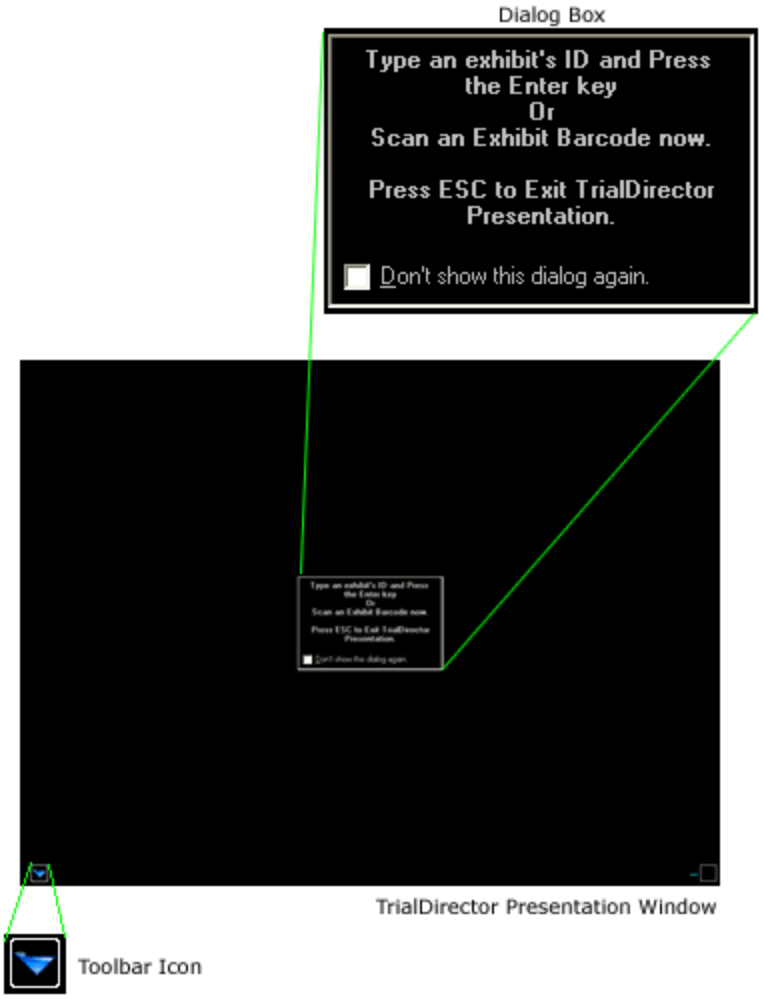
- Presentation Display
- Control the Presentation Display
- Presentation Toolbar
- Save the Presentation Display
- Presentation Options
- PowerPoint Plug-In

Presentation Mode - The Basics

Topics:

- Options Window
- The Mouse Pointer
- Presentation Window Indicators
- Change the Presentation Background
- Close the Presentation Display

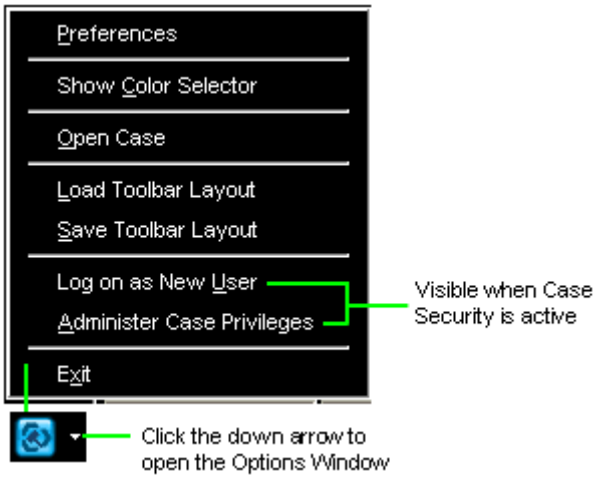
When you first open the Presentation mode, a dialog box located in the middle of the presentation screen tells you to enter an Item ID or scan a barcode to load the first exhibit. To eliminate distractions to the audience or jury, the rest of the screen is blank, except for the Toolbar icon in the lower-left corner.


Dialog Box
Type an exhibit's ID and Press the Enter key
Or
Scan an Exhibit Barcode now.
Press ESC to Exit TrialDirector Presentation.
Don't show this dialog again.
TrialDirector Presentation Window
Toolbar Icon

Select **Do Not show this Dialog Box Again** if you would like the screen to appear blank the next time you enter Presentation mode.

Options window

To open the options window, click the down arrow on the right side of the TrialDirector icon. The options window will appear above it, as shown below.

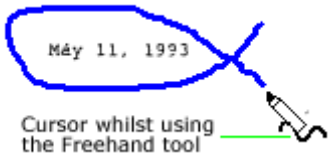


The options available:

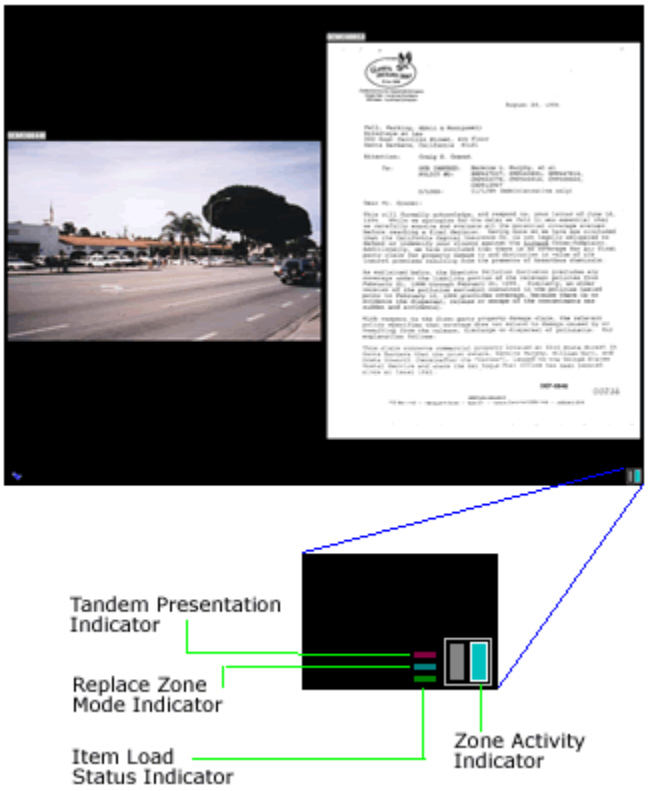
- Preferences - Selecting this option opens the Presentation mode Preferences dialog.
- Show Color Selector - This option displays the color selector box with the available choices of color.
- Open Case - Selecting this option will open the Open a Case Window
- Load Toolbar Layout - Displays a list of existing Toolbar Layouts files (*.tlb), which can be selected and loaded
- Save Toolbar Layout - Saves the current Toolbar Layout as a (*.tbl) file
- Log on as New User - **Note:** You must be logged into the Case to View this dialog.
- Administer Case Privileges - **Note:** You must be logged into the Case to View this dialog.
- Exit - Selecting this option will close the Presentation mode.

The Mouse Pointer

The mouse pointer reflects the active tool selected from the annotations toolbar. In the example below, the freehand tool is being used and is indicated by the squiggly line under the pen shaped pointer. Every annotation tool has its own distinct pointer.



Presentation Window Indicators



Item Load Status Indicator

A small colored bar indicates the status of the item currently being loaded into TrialDirector. The following colors indicate the activity status:

- A **green** bar indicates the item is being loaded.
- A **yellow** bar indicates the item cannot be found in the case database. If this happens, try retyping the Item ID or re-scanning the barcode. If the bar is still yellow, the item is not in the case.
- A **red** bar indicates that the selected source file could not be loaded due to a missing or corrupt file.
- A white bar indicates that the Screen Blanker Tool is in use.

Replace Zone Indicator

A small **blue** bar appears when Replace Zone Mode is active (see Using Replace Zone Mode).

Note: *Use Replace Zone Mode for smoother image transition.*

Tandem Presentation Indicator

A small **crimson** bar appears when Tandem Exhibit Presentation mode is enabled (see Tandem Exhibit Presentation).

Toolbar Icon

The Toolbar Icon allows you to access the TrialDirector tools available for use during presentations.

- Left-click the Toolbar Icon to bring the Presentation Toolbar in and out of view.
- Hold down the Alt key and click the Toolbar Icon to open the Presentation Options window.

Zone Activity Indicator

The zones in use are indicated by the shape and position of the boxes in the Zone Activity Indicator. The active zone is highlighted in blue, and the selected zone is outlined in white.

Right-click on the Zone Activity Indicator to display the Item ID of the item in the active zone. Left-click on the Zone Activity Indicator to return focus to TrialDirector when you are manipulating OLE files.

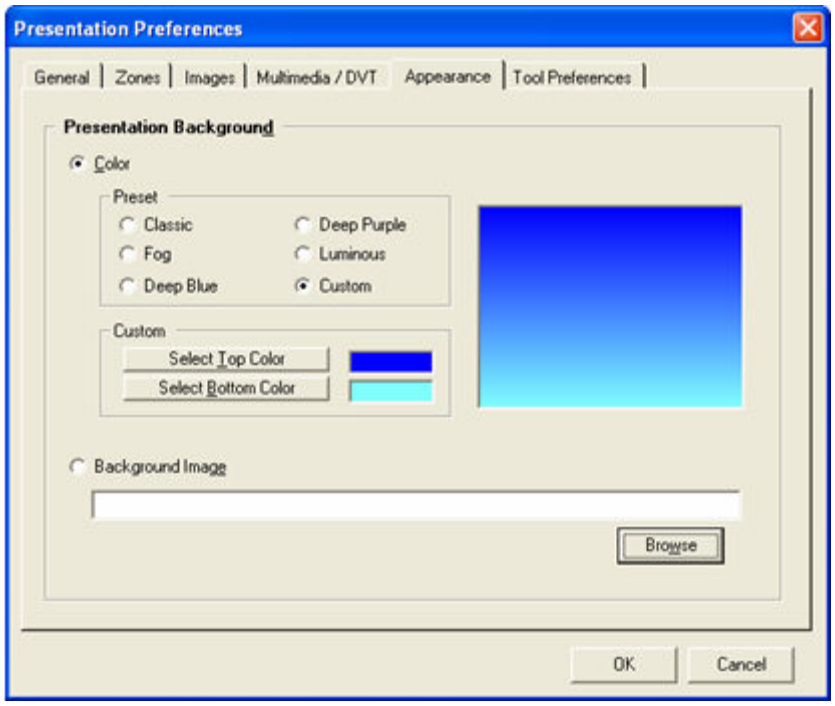
Change the Presentation Background

TrialDirector allows you to customize the background of the presentation display.

1. Do one of the following:

- In the main TrialDirector window, select **Presentation Options** from the View menu.
- In Presentation mode, click the down arrow next to the Toolbar icon in the lower-left corner of the presentation display.

2. Then choose the appearances tab, as shown in the figure below.



The current background selection is displayed in the square to the right of the color option selectors.

C. Do one of the following:

a. Change the background color
- Click the **[Color]** option button
- Select **[Custom]** color option
- Click **[Select Top Color]**, choose the desired color and click **[OK]**
- Click **[Select Bottom Color]**, choose the desired color and click **[OK]**

OR

b. Change the background image
- Click the **[Background Image]** option button
- Click **[Browse]** button, navigate to the required image and select it
- Click **[Open]**

4. Click **[OK]** on the Presentation Options window.

The presentation background will remain the same for all cases until you change it again.

Close the Presentation Display

To close TrialDirector, press Escape once to clear all items from the screen and then press Escape again and the following dialog is shown:

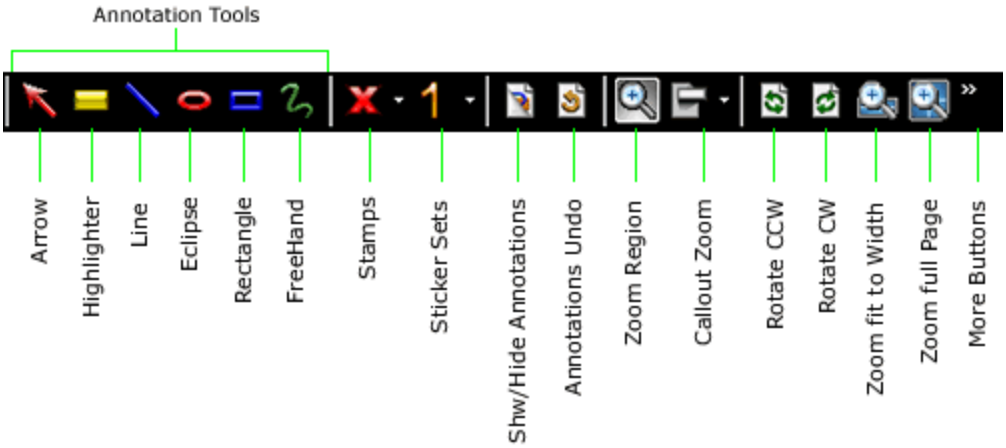
More Information:

- Presentation Mode
- Presentation Toolbar

Presentation Toolbar

The Presentation Toolbar enables you to annotate exhibits with arrows, highlights, projections, and more. To show or hide the Presentation Toolbar, click the icon in the lower-left corner of the presentation display.

The default toolbar is shown below.



The Presentation Toolbar is dynamic and fully customizable. Click any of the following topics for more information:

Button Descriptions

More Buttons

Displays additional buttons and enables you to access the complete list of buttons so you can decide which to display and which to hide.

Arrow

Enables you to place arrows on an item. The point first touched by a light pen or clicked by a mouse becomes the head of the arrow.

Highlighter

Enables you to mark an item with a highlight.

Line

Enables you to mark an item with an underline.

Ellipse

Enables you to surround an area on an item with an ellipse.

Rectangle

Enables you to surround an area on an item with a rectangle.

Freehand

Enables you to mark an item with a freehand line.

Text Tool

Enables you to place a text box on the exhibit.

Annotation Edit Mode

When active this tool allows the editing, moving and reshaping of annotations. The TrialDirector Zone Indicator will turn to a violet color when the Annotation Edit Mode is active

Annotation Undo

This tool removes any annotation in the reverse order that they were placed onto the exhibit whilst in presentation mode

Annotation Erase

This tool removes all annotations from the exhibit, regardless when they where placed on.

Show / Hide Annotations

This tool allows toggling between hiding or showing annotations on the Presentation display.

Redaction Tool

This tool allows you to place a redaction onto the exhibit.

Stamps

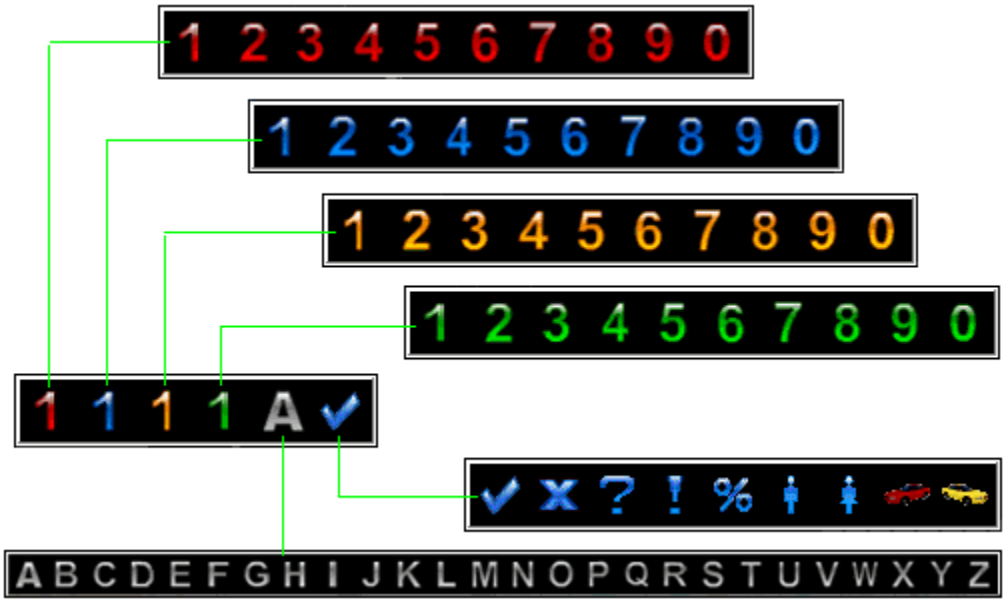
This tool allows you to place stamp marks onto the exhibit. Presently there are four stamp marks available to you.

By clicking the down arrow on the right side of the stamps tool, the selection box shown above is made available.

Sticker Sets

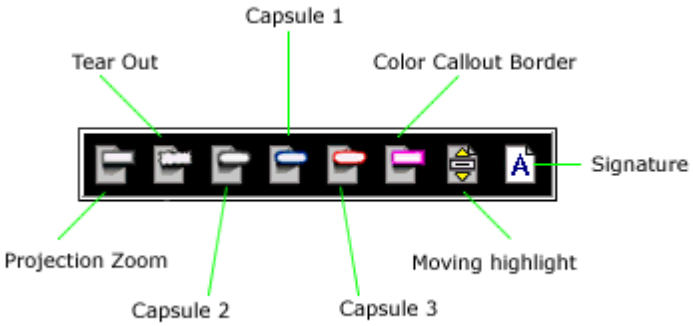
The sticker tool allows you to place stickers onto the exhibit. Presently there are five sets of stickers marks available to you. By clicking the down arrow on the right side of the sticker tool, the selection box shown below is made available.

Right-clicking on one of these will bring up a further selection box. This box allows you to choose at which number/letter to start from when applying your stickers. The diagram below shows all of the selection boxes.



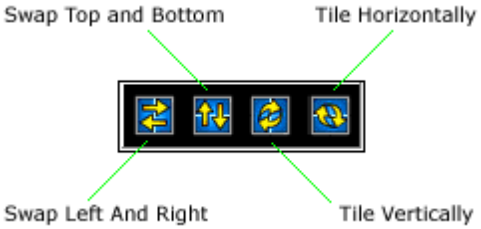
Call Out Zoom

This tool allows you to place call outs onto the exhibit. The portion of the image that is not selected turns gray.
By clicking the down arrow on the right side of the call out tool, the selection box shown below is made available. The diagram below shows all of the call out selections available.



Swap Zones

This tool allows you to swap exhibits whilst they are in certain zones. By clicking on the button, a further menu is made available. Which is seen below.



The selections available depend on which zones are currently in use. The following is a list of combinations

If Exhibits are in Zone 1 and 2 then:

- Swap Left and Right
- Tile Vertically

If Exhibits are in Zone 3 and 4 then:

- Swap Top and Bottom
- Tile Horizontally

Screen Snapshots

The Screen Snapshot Command allow you to capture the entire Presentation display and

save it as a new item in Document Manager's Photo folder. **Note:** You can change the location to a custom folder on the Presentation Preferences, Images tab.

Snapshots Available

If there are Snapshots available they can be located and viewed by clicking the **Snapshots Available** tool button.

To located and view Snapshots:

1. Click the **Snapshots Available** tool button.
2. Click the **show / hide list** button that will appear.
3. Click on the snapshot that you want to view.

Zoom Region

This tool allows you to toggle between Rubber-band Zoom Mode and Fill Zone Zoom Mode. In this mode, when you select an area to enlarge, the area fills the entire zone where it is displayed . You can set this as the default zoom mode in the Presentation Options.

Zoom Fit to Width

This tool will expand the exhibit to fill the whole width of the available Zone and zooms in at the same time.

Zoom Full Page

This tool will expand the exhibit to fill the whole height of the available zone.

Zone Shape Zoom

This tool zooms in on the region that is outlined by drawing a rectangle around the required area and zooms in. This tool is used in conjunction with the other zoom tools. By holding the right mouse down and moving the mouse the area that is magnified will be moved

Rotate Counter Clockwise
This tool allows you to rotate the image in the active zone 90 degrees counter-clockwise each time you click the button.

Rotate Clockwise
This tool allows you to rotate the image in the active zone 90 degrees clockwise each time you click the button.

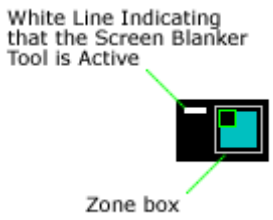
Page Up
This tool allows you to move to the previous page of a multiple page document.

Page Down
This tool allows you to move to the next page of a multiple page document.

Undo
This tool allows you to undo the last action. You can undo as many actions as necessary.

Clear Screen
This tool allows you to clear the Presentation Display of all items.

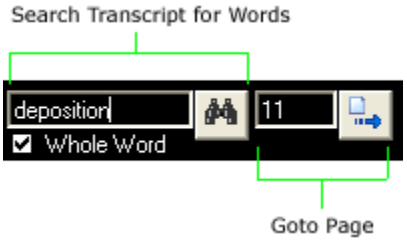
Screen Blanker
This tool will send the presentation blank, by clicking it a second time, the screen will be restored to its previous state.
When the Screen Blanker tool is in use a white line appears next to the zone indicator as shown below:



Remover
This tool allows you to remove annotations on an item by positioning the X over the markup you want to remove and clicking. The Remover tool can also be used to close any item except an OLE file by clicking in the upper-left corner of the item. This tool remains active until you turn it off.

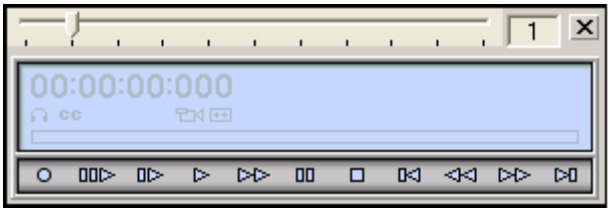
Transcript Search / GoTo Page

This tool allows a transcript to be searched when loaded into TrialDirector. To tool can also be used to go to a different page in the transcript.



VCR

This tool displays the VCR controls shown below.



Displaying or Hiding Buttons

To display or hide a button:

1. Click the **More Buttons** icon »
2. Point to **Add or Remove Buttons**.
   A list of all buttons appears with a checkmark next to each button that is currently displayed.
3. Click the button to toggle display on or off.
4. When you are finished, click anywhere in the presentation display.
5. Follow the "Saving Your Toolbar Layout" instructions below to save the custom toolbar with a new name. Do not save over the default toolbar (Default.tlb).

Removing Buttons

Caution: Using the method below is equivalent to "throwing away" a toolbar button, and the only way to retrieve it is to load the default toolbar. If you may want to use a button later on, follow the procedure above to hide it, rather than remove it.

To remove buttons:

1. Click the first button you want to remove on the toolbar.
2. Hold down the ALT key while you drag and drop the button onto the presentation (black) area of the screen.

The button disappears and is no longer listed on the More Buttons > Add or Remove Buttons menu.

3. Repeat the previous steps for any other buttons you want to remove.
4. Follow the "Saving Your Toolbar Layout" instructions below to save the custom toolbar with a new name. Do not save over the default toolbar (Default.tlb).

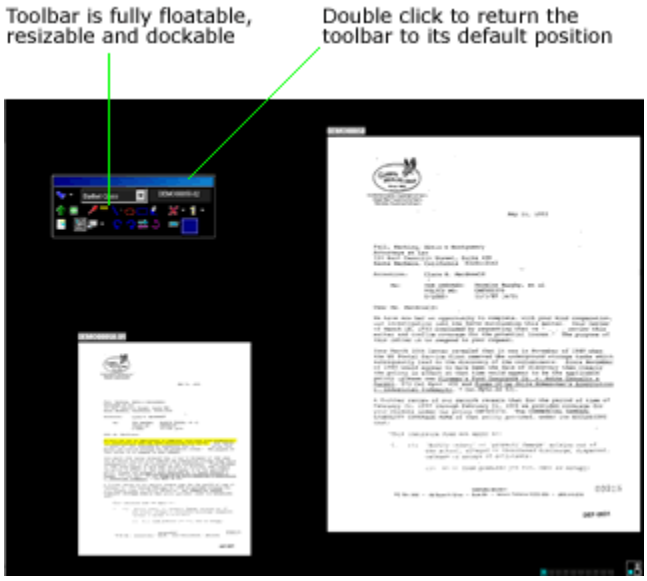
Rearranging Buttons

To rearrange buttons:

1. Click the button you want to move on the toolbar.
2. Hold down the ALT key while you drag and drop the button to the desired location.
3. Repeat the previous steps for any other buttons you want to move.
4. Follow the "Saving Your Toolbar Layout" instructions below to save the custom toolbar with a new name. Do not save over the default toolbar (Default.tlb).

Positioning the Toolbar (Docking, Floating, and Resizing)

The toolbar can be "torn off" (floating), repositioned, and resized. When using dual screens, the tool bar can be "torn off" and placed anywhere on the second screen where desired.

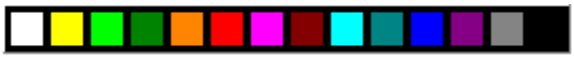


To return the toolbar to it's original position at the bottom of the main presentation screen, double click anywhere in the toolbar header.

Changing the Annotation Color

1. To change the default annotation color, open the Presentation Toolbar and right-click on the annotation tool you want to change.

   A color palette will appear above the tool, as shown in the figure below.



2. Select the desired color. Click in the black area to the left of the color palette to close it without changing the color.

   Note: *You will not be able to clear the presentation display when the color palette is open.*

The annotation tool will show the new color, as shown in the figure below.

Saving Your Toolbar Layout

To save your layout changes as a custom toolbar:

***Caution*:** Do not save over the default toolbar (Default.tlb).

1. Click the arrow to the right of the icon
2. Click **Save Toolbar Layout**.
3. In the **File name** box, type a name for this toolbar layout.
4. Click **Save** to save the current toolbar layout as a (*.tbl) file.

Loading a Toolbar Layout (Resetting to the Default Toolbar)

To load the default toolbar or a saved layout:

1. Click the arrow to the right of the icon
2. Click **Load Toolbar Layout**.
3. Select Default.tlb to discard any unsaved toolbar customizations and load the default toolbar.
   -OR-
   Select another (*.tlb) file to load a custom toolbar layout.

Note the following:

- Toolbar configurations are saved separately for normal use and for PowerPoint plug-in use. This makes it possible to have a one toolbar visible for PowerPoint and a different toolbar configuration for normal use. This is important because the screen width is normally less while TrialDirector is embedded in PowerPoint, so having a scaled down toolbar is an advantage.
- By default, all tools, except for the Area Projection tool, remain enabled until you click to disable them. You can change this setting in the Presentation Options.
- If you want to be able to double-click to clear the current tool selection, you can select that option in the Presentation Options.

More Information:

- Presentation Mode
- Control the Presentation Display

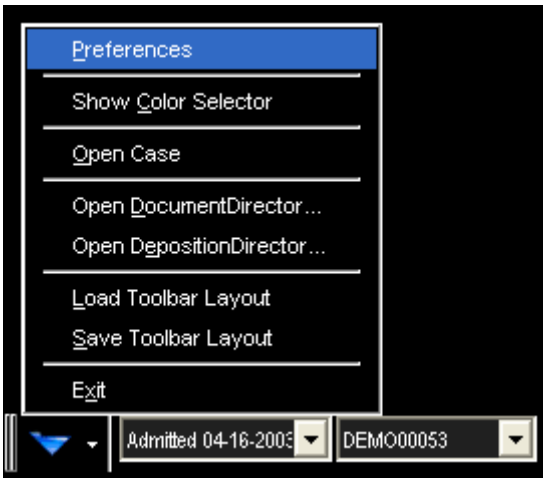
Presentation Options

Topics:

- Opening Presentation Preferences
- General Options
  - Tool Clearing
  - Default Zoom Options
  - Screen Capture Format
  - Display on Screen
  - Presentation Event Log
  - Miscellaneous Options
- Zones Settings
  - Zone Headers
  - OLE Object Zone Windows
  - Default Zone Mode
  - General
- Images Settings
  - Image Display Control
  - Redaction Control
  - Snapshots
- Multimedia/DVT Settings
  - Transcript Text Properties
  - Closed Captions
  - Synchronized DVT Exhibits
- Presentation Background
- Tool Preferences

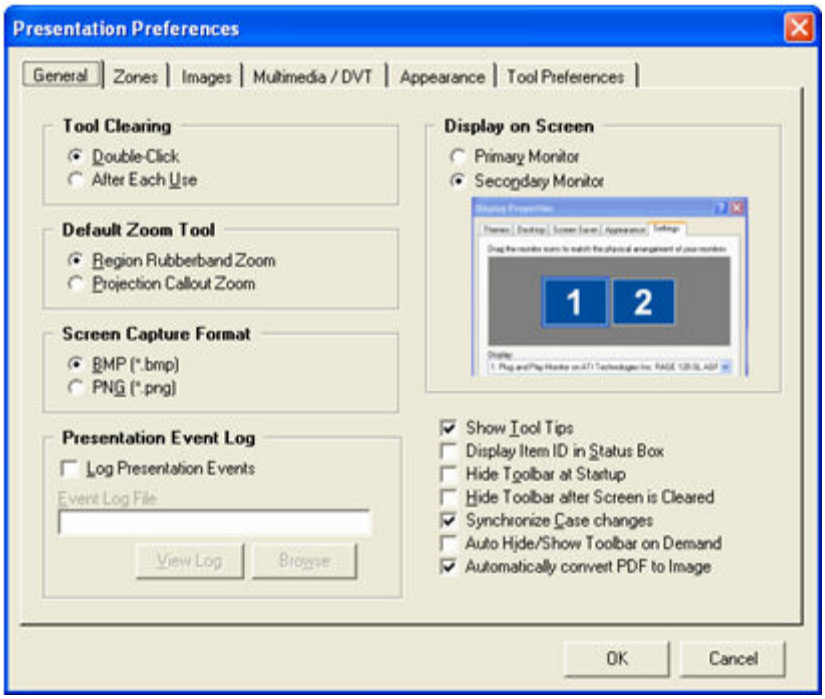
To open the Presentation Preferences dialog box, do one of the following:

- Select **Presentation Preferences** from the View menu in TrialDirector.
- Select **Preferences** from the Presentation mode drop down menu button, as shown below.



General Options

The General tab within the Presentation Options window allows you to set the options for the Presentation Mode Toolbar, screen display, screen capture format and other miscellaneous items.



Tool Clearing

Option	Description

Double-Click	This option allows you to clear the current tool selection and return to zoom mode by double-clicking on the presentation display.
After Each Use	When this option is enabled, your tool selection will be cleared after you use the tool once.

Default Zoom Tool

Option	Description
Rubber band Zoom	This option sets the default zoom mode to the rubber band zoom. When used in conjunction with the Zone Shape Zoom, all Rubber band zooms will be aspect ratio zooms.
Projection Callout Zoom	This option sets the default zoom mode to Projection zoom. When used in conjunction with Zone Shape Zoom, all projections will be aspect ratio zooms.

Screen Capture Format

Option	Description
Bitmap	Use this option to select the file format of the screen captures created from TrialDirector. The Bitmap (.bmp) file type is set as the default.
Portable Network Graphics	Select the Portable Network Graphics (.png) option if you wish to create this file type. The main advantage of using the .png type is a significantly smaller file size, while maintaining the same image quality as a bitmap. On average, the screen captures created in the .png format are about 1/8th the size of the bitmap counterpart.

Presentation Event Log

Option	Description
Log Presentation Events	When this option is enabled, all events that occur during a presentation are recorded in a log file for later review. Enter a fully qualified destination path and file name for the log file (e.g., C:\My Documents\log1.log), or click the BROWSE button to navigate to the desired destination folder and enter a file name. Once you have completed your presentation, click the VIEW LOG button to open and view the log file.

Display on Screen

Option	Description
Primary Monitor	Sets the primary monitor to display the TrialDirector presentation screen. The Primary Monitor is the default setting.
Secondary Monitor	Sets the secondary monitor to display the TrialDirector presentation screen. This option is to be used when running dual monitors. Most modern laptop PCs support dual displays under Windows XP. Also, there are many dual-display video cards available for desktop PCs. Contact your PC manufacturer to determine if your computer supports dual displays. ***Note:*** *Dual screen use is supported when the secondary monitor is oriented to the right of the primary monitor, as shown in the Windows Display Properties dialog below.*

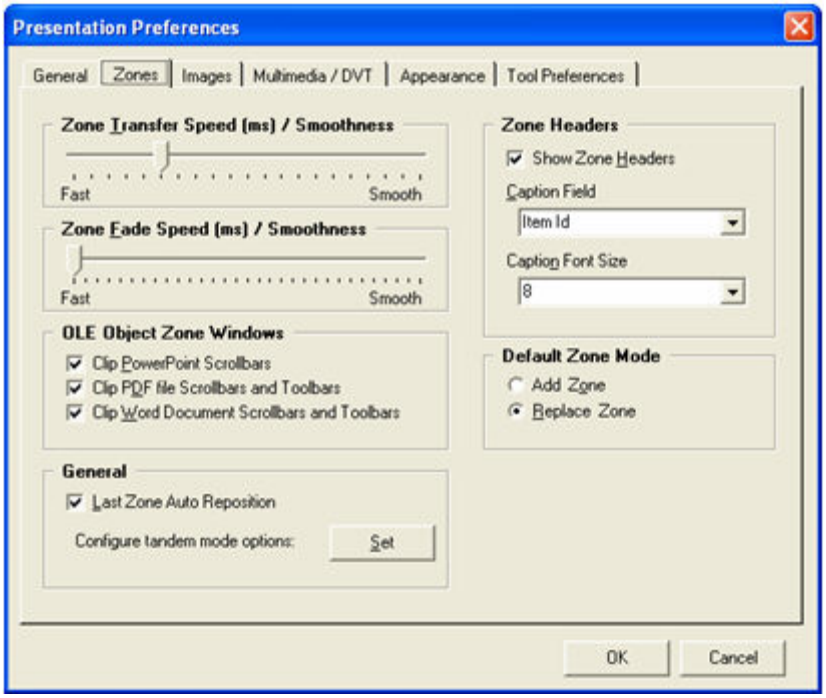
Miscellaneous Options

Option	Description
Show Tool Tips	When this option is enabled, a small pop-up help window appears next to your cursor when you place it over a tool on the Presentation Toolbar.
Display Item ID in Status Box	Enable this option to always display the current Item ID (within the active zone) in the Status Box, which appears on the right side of the Presentation Toolbar. This option is disabled by default.
Hide Toolbar at Startup	Enable this option to hide the tool bar when TrialDirector is launched
Hide Toolbar after Screen is Cleared	Enable this option to hide the Presentation Toolbar after the screen is cleared. This option is disabled by default.
Auto Hide/Show Toolbar on	When this option is enabled, the Tool bar will be hidden unless the mouse cursor is placed over it.

Demand	
Synchronize Case changes	When this option is enabled, the Presentation mode will attempt to follow case changes initiated from the Document Manager or Transcript Manager tabs. To manually change cases, use the OPEN CASE option from the Presentation Toolbar menu.

Zones Settings

The Zones tab within the Presentation Options window allows you to set the zone options for Presentation Mode.



Option	Description
Zone Transfer Speed/Smoothness	This feature controls the speed and smoothness of image transfer between zones in the Presentation Module. Slide the bar right to make the image transfers slower and smoother or left to make the transfers faster. The units are in milliseconds.
Zone Fade In/Out Speed/Smoothness	This feature controls the speed and smoothness of image fade in and fade out in the Presentation Module. Slide the bar right to make the image fading slower and smoother or left to make the fading faster. The units are in milliseconds.

Option	Description
Clip PowerPoint Scroll bars	This option prevents the scroll bars in PowerPoint from appearing on the display when presenting a PowerPoint file in TrialDirector.
Clip PDF File Scroll bars & Toolbars	This option prevents the scroll bars and toolbars in the Adobe Acrobat Reader from appearing on the display when presenting an Acrobat file in Presentation mode.
Clip Word Document Scroll bars & Toolbars	This option prevents the scroll bars and toolbars in Microsoft Word from appearing on the display when presenting a document in TrialDirector.

OLE Object Zone Windows

Zone Headers

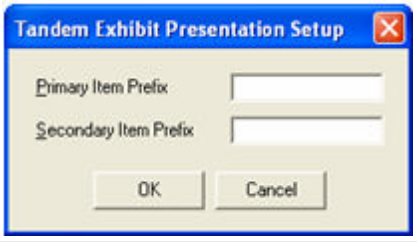
Option	Description
Show Zone Headers	When this option is enabled, a small header appears at the top of every item displayed on the presentation display. The header consists of a caption, whose content is determined by the Caption Field selection, and the Zone Header Controls.
Caption Field	This option determines which field information will be used as the header caption on items displayed on the presentation display when the Show Zone Headers option is enabled.
Caption Font Size	This option determines the font size of the header caption on items displayed on the presentation display when the Show Zone Headers option is enabled.

Default Zone Mode

Option	Description
Add Zone	Sets the Zone Add Mode as default.
Replace Zone	Sets the Zone Replace Mode as default.

General

Option	Description
Last Zone Auto	When this option is enabled, the last item remaining

Reposition	on the screen after items in multiple zones have been closed will automatically be resized to fill the full screen, or zone 9.
Set	This option allows you to set the primary and secondary item prefix parameters for tandem exhibit presentations. 

Images Settings

The Images tab within the Presentation Options window allows you to set the image viewing options.

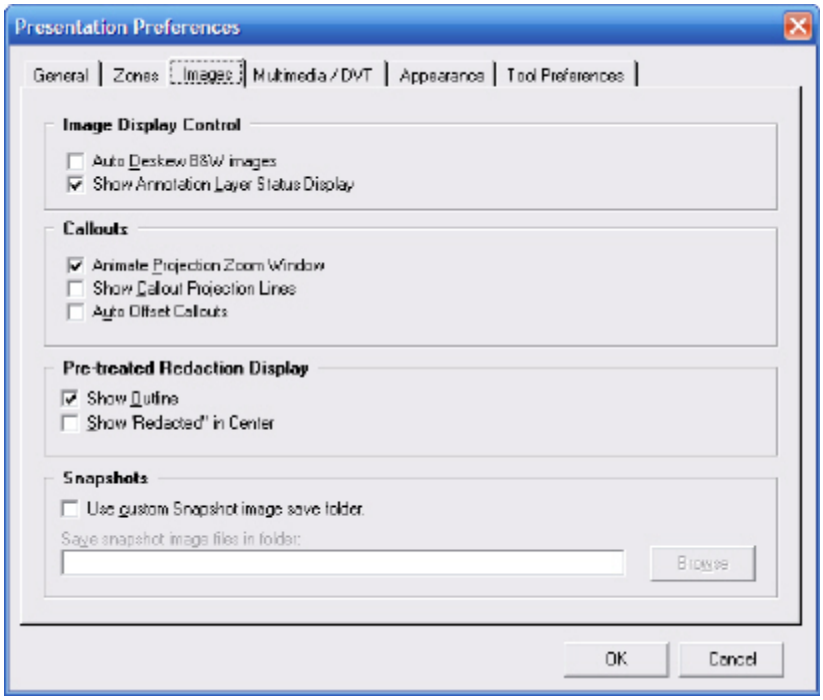


Image Display Control

Option	Description
Auto Deskew	When this option is selected, black and white images

B&W Images	are automatically deskewed when they are loaded on the presentation display.
Show Call-out Projection Lines	When checked, projection lines will appear on an area projection to indicate the position of the projected area in relation to the original item.
Animate Projection Zoom	When checked, area projections are gradually expanded and retracted, producing an animation effect.
Show Layer Status Display	When checked, this option will display a visual display for controlling image layers during presentation, as shown below.

Redaction Display

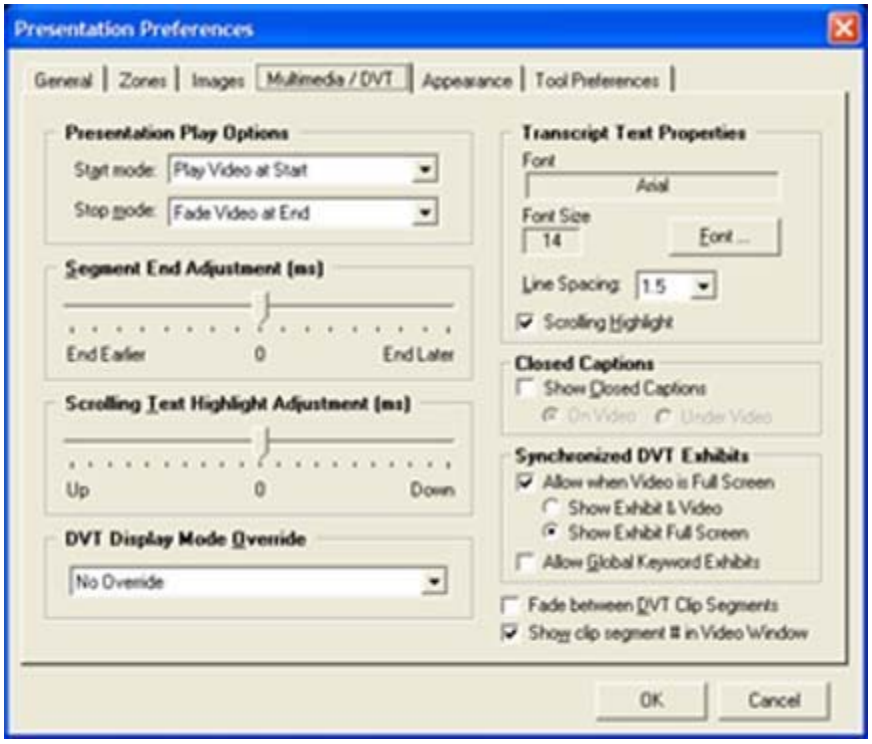
Option	Description
Show Outline	When enabled, this option will show an outline (border) around any redaction annotations included on images displayed in TrialDirector.
Show Redacted in Center	When enabled, this option will show the statement *Redacted* in the middle of redaction annotations included on images displayed in TrialDirector.

Snapshots

Option	Description
Use custom Snapshot image save folder	When enabled, allows you to specify the folder where all images captured using the Screen Snapshot tool will be saved.
Save snapshot image files in folder	If the above option is enabled, you can type or Browse to the folder where all Screen Snapshot images should be saved.

Multimedia/DVT Settings

The Multimedia/DVT tab within the Presentation Preferences window allows you to set the Presentation Mode Multimedia and Digital Video Transcript options.

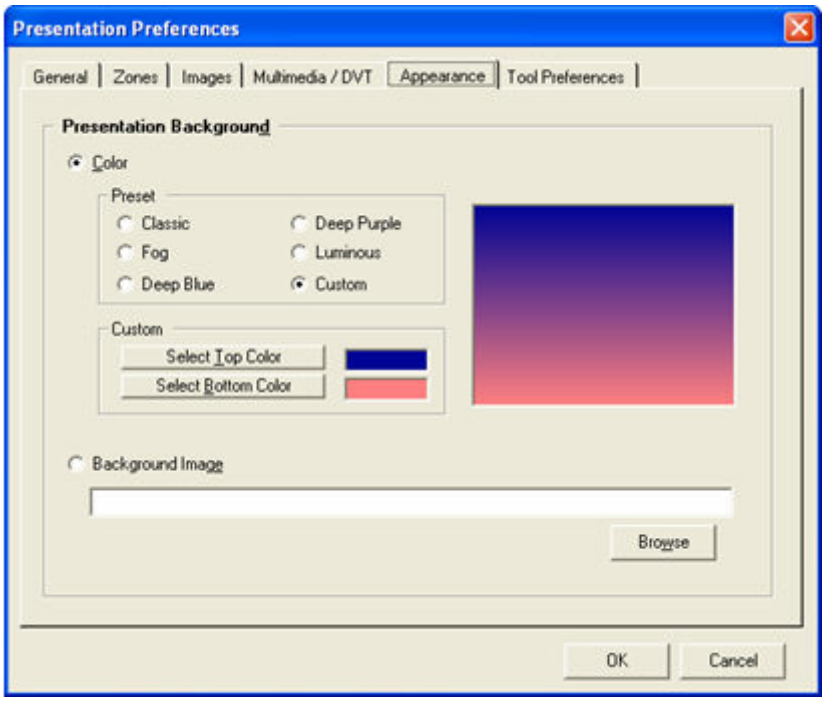


Option	Description
Presentation Play Options	
Start Mode	This option determines whether multimedia files will start in playback or paused mode.
Stop Mode	This option determines whether multimedia files will close, pause, or fade at the end.
Segment End Adjustment (ms)	
End Earlier/End Later	This slider bar allows you to adjust the ending position of the multimedia segments. Slide the bar to the left if you want the multimedia to end earlier, and slide the bar to the right if you want the multimedia to end later. The units are in milliseconds.
Scrolling Text Highlight Adjustment (ms)	
Up/Down	This slider bar allows you to adjust the position of the highlighter bar when a synchronized transcript is playing on the presentation display. If the highlighter bar seems to be moving too far ahead of the text, slide the bar to the left to delay it. If the highlighter bar seems to be moving too far

	behind the text, slide the bar to the right to advance it. The units are in milliseconds.
Display Mode Override	
No Override, Video & Text, Text Only, Video Only	This option allows you to override the setting in the Display Option field on the DVT tab. Select **No Override** to keep the settings on the DVT tab, or select **Video & Text**, **Text Only**, or **Video Only** to set the display mode for all Digital Video Transcripts.
Transcript Text Properties	
Font	This option determines the font used when displaying transcript text. Click the **[Font...]** button to select the font (see Customize Transcript Appearance).
Font Size	This option determines the transcript font size. Click the **[Font...]** button to customize the font.
Line Spacing	This option allows you to set the line spacing for DVT transcripts when they are presented.
Scrolling Highlight	When this option is enabled, a yellow bar will highlight the speaker's words on the scrolling transcript.
Closed Captions	
Show Closed Captions	When this option is enabled, the associated transcript text appears when you present a video deposition. Display closed captioning underneath the deponent's video or on top of the video to save screen space.
On Video	This option displays the transcript text on top of the video to save screen space.
Under Video	This option displays the transcript text below the video.
Synchronized DVT Exhibits	
Allow when Video is Full Screen	When this option is enabled with **Show Exhibit & Video** selected, exhibit attachments will appear in zone 1 and the DVT video will move from zone 9 to zone 6 during full screen playback in Presentation mode. If **Show Exhibit Full Screen** is selected, the DVT appears in full screen. When an exhibit is referenced in the video testimony, the exhibit will then appear on the full screen and will automatically fade back to the video testimony (or, you can pause the presentation to allow the jury extra time to view the exhibit).
Allow Global Keyword Exhibits	This option allows exhibits to be automatically loaded onto the presentation screen when a keyword is detected.

Other Options	
Fade Between Segments of DVT Clip	When enabled, this option will produce a fade in/fade out effect when transitioning between segments during DVT Clip playback. Note: Fade performance when using this option may be affected by the display adapter installed in your PC.
Show clip segment # in Video Window	When this option is enabled, the segment # of the clip in a multi-segment clip exhibit will appear in the top righthand corner. The segment # can also be toggled on and off by clicking the right mouse button in the top right corner of the video.

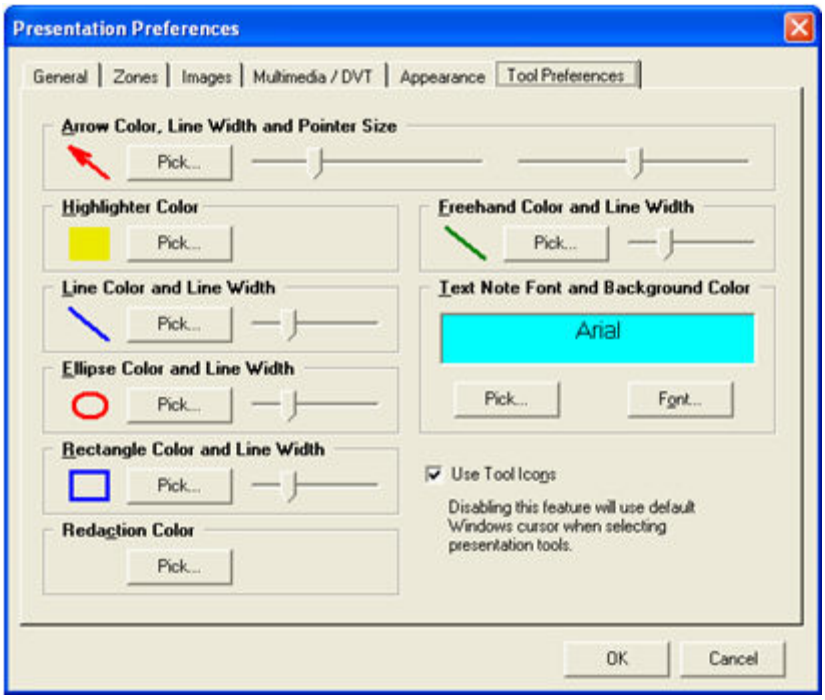
Presentation Background



Option	Description
Select Color	This option sets the background color for the Presentation Display. ***Note:*** *For best appearance, leave the presentation background black when zone headers are enabled.*
Select Image	This option sets the background image for the

	Presentation Display. **Note:** *For best appearance, leave the presentation background black when zone headers are enabled.*

Tool Preferences



Option	Description
Arrow	This option can be used to set the Arrow color, Arrow line width and pointer size.
Highlighter	This option can be used to set the highlighter color.
Line	This option can be used to set the Line color and Line width.
Ellipse	This option can be used to set the Ellipse color and Ellipse width.
Rectangle	This option can be used to set the Rectangle color and Rectangle width.
Freehand	This option can be used to set the Freehand color and Freehand width.
Redaction	This option can be used to set the Redaction color.
Text Note & Background color	This option can be used to set the Text color and the Text Box Background color.

Use Tool Icons	Disabling this feature will result in the Windows cursor being used when using presentation tools

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More Information:

- Presentation Display
- Control the Presentation Display
- Presentation Toolbar

Zones

Zones

The Presentation Display is divided into nine (9) zones, which allow you to display multiple case items at the same time. Using different zones and zone modes allows you to control how and where items are displayed.

What do you want to do?

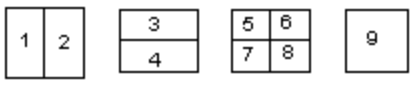
- Define Screen Zones
- View Possible Zone Combinations

More Information:

- Zones

Define Screen Zones

To select a particular zone, press the corresponding function key on the keyboard (i.e., F1= zone 1, etc.) or scan the barcode associated with the zone. Once a zone is selected, you can load an item into that zone. Each zone is independent of the other zones, which means that you can load and annotate an item in any zone without affecting the items in the other zones. This section describes each of the zones.



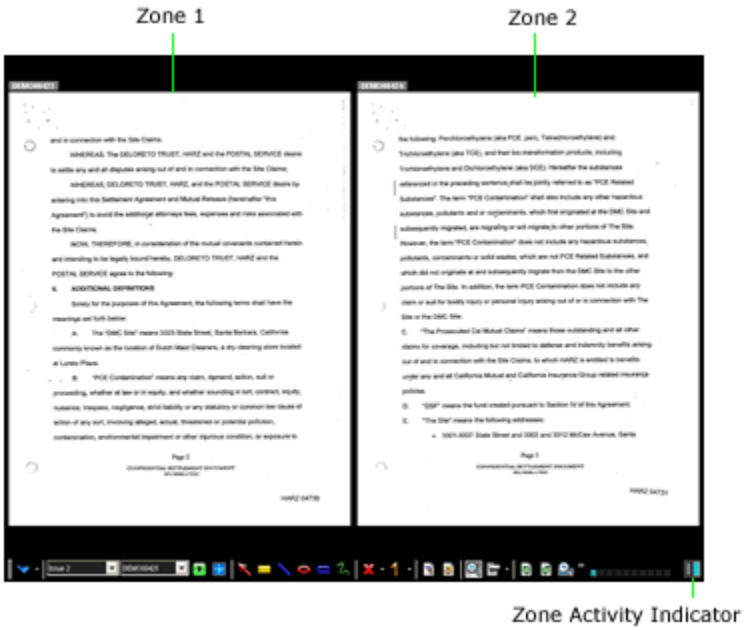
- Zones 1 & 2 split the display vertically.

- Zones 3 & 4 split the display horizontally.
- Zones 5, 6, 7 & 8 split the display into quadrants.
- Zone 9 uses the full display.

Note: *It is not necessary to select a zone to view items. Zone 9 is the full screen default zone, and you can begin viewing items in it by loading an item.*

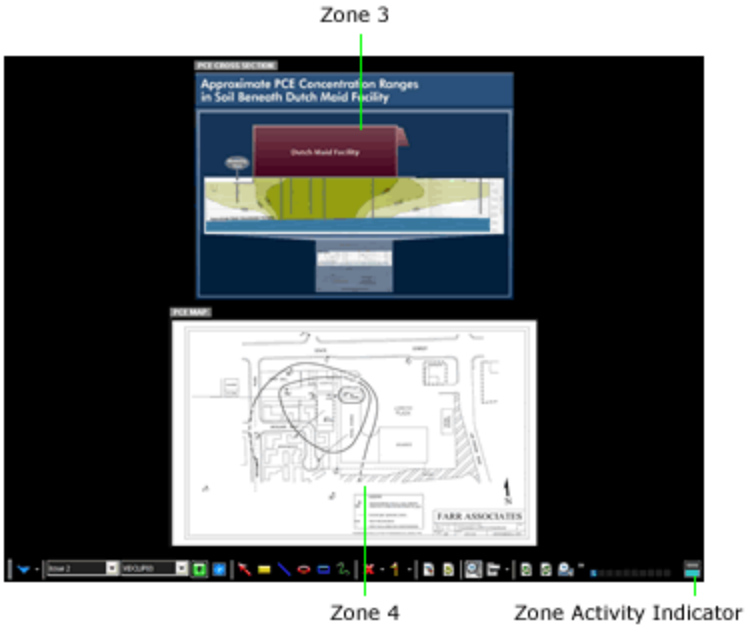
Zones 1 and 2

If you want to display two items side-by-side simultaneously, you can set up zones 1 and 2 to split the screen vertically. The figure below displays documents in zones 1 and 2. The Zone Activity Indicator displays both zones, with the active zone highlighted in blue.



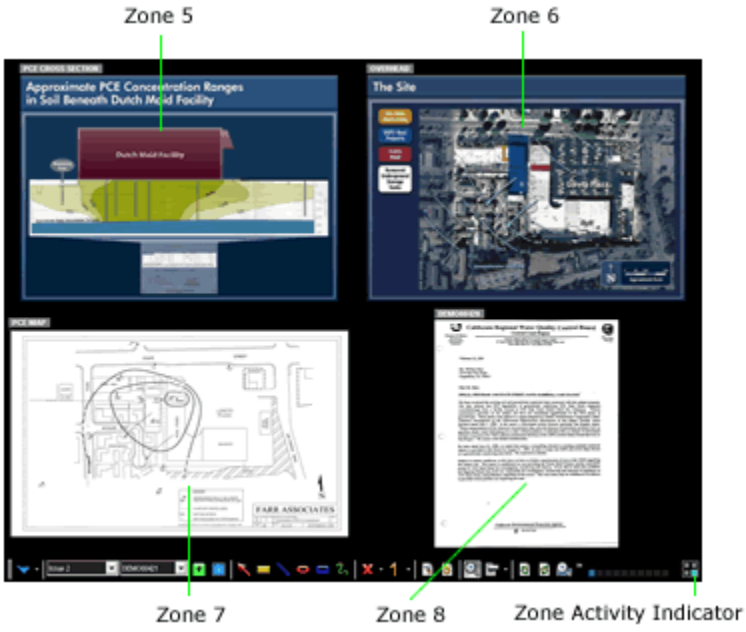
Zones 3 and 4

If you want to display two items on the top and bottom of the screen simultaneously, you can set up zones 3 and 4 to split the screen horizontally. The figure below displays exhibits in zones 3 and 4. The Zone Activity Indicator displays both zones, with the active zone highlighted in blue.



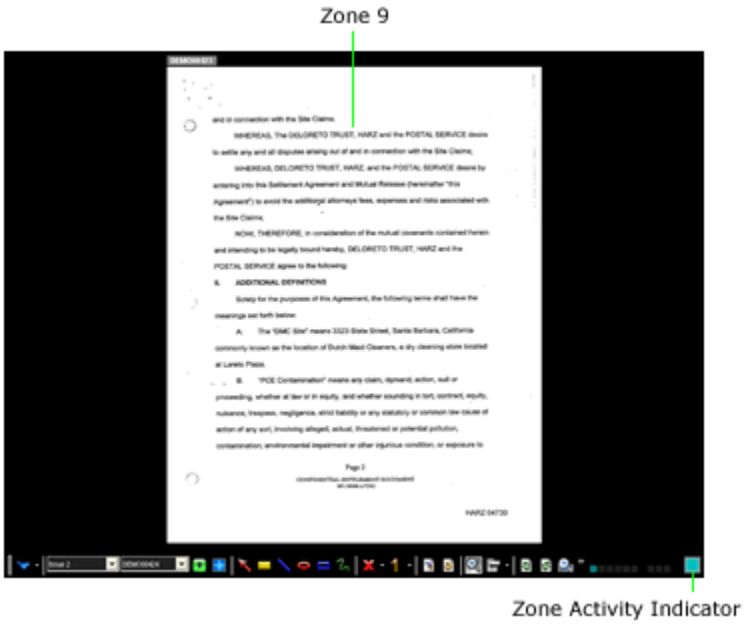
Zones 5, 6, 7, and 8

If you want to display four items simultaneously, you can use zones 5, 6, 7, and 8 to split the screen into quadrants. The figure below displays exhibits in zones 5, 6, 7 and 8. The Zone Activity Indicator displays all four zones, with the active zone highlighted in blue.



Zone 9

Zone 9 is the default zone and represents the entire Presentation display. The figure below displays an exhibit in zone 9. The Zone Activity Indicator displays only one zone, which is highlighted in blue because it is active.



Note: *When you close the items in all of the zones except one, you can have TrialDirector reposition the remaining item into zone 9 by selecting the auto zone reposition option in the Presentation Options dialog (see Set Presentation Options).*

More Information:

- Zones

Presentation Mode - Add Zone Mode

Topics:

- Move Items Left to Right
- Move Items Right to Left
- Move Items Top to Bottom
- Move Items Bottom to Top
- Move Items Through the Quadrants

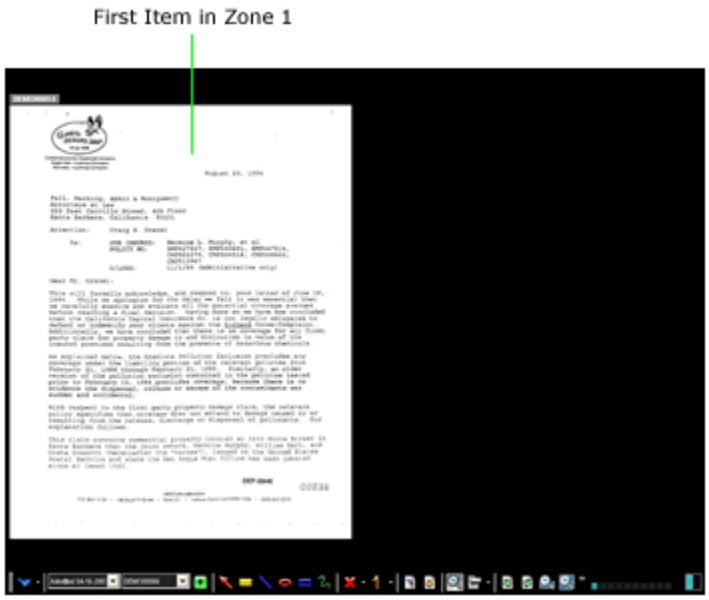
Whenever you enter the TrialDirector Presentation Module, Add Zone Mode is the active mode by default. This mode allows you to add items into specific zones while moving old items into other zones or off the screen if there are no other zones available. This creates a "slide show" or page-turning effect. If you are not already in Add Zone Mode, you can select Add Zone Mode by pressing **[F11]**. You are in Add Zone Mode if the Replace Zone Indicator is not on.

Vertical Split -- Move Items Left to Right

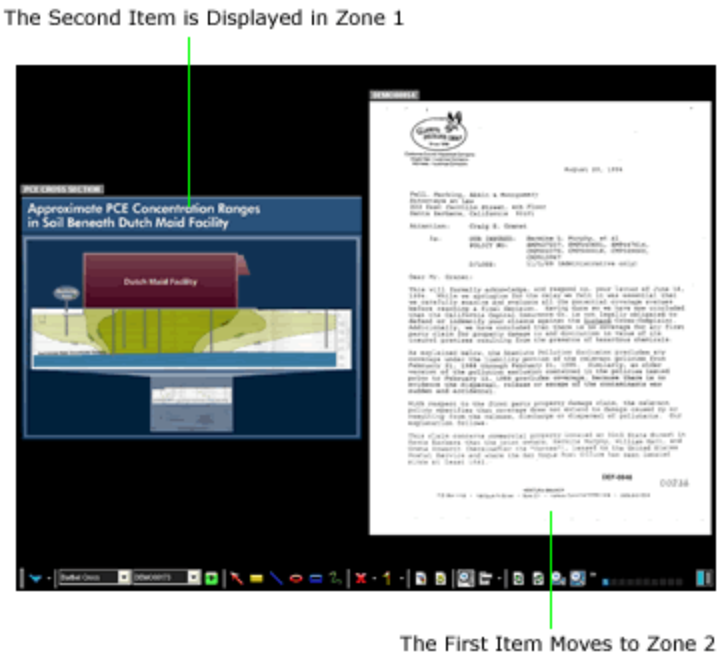
The vertical split is best suited for portrait images and other items that have greater length than width because of the shape of zones 1 and 2.

To move items from left to right, use Add Zone Mode to load successive items into zone 1. The following is a detailed description of the process.

From a blank display, load an item into zone 1 by pressing **[F1]** and then typing the Item ID or scanning the appropriate barcode.

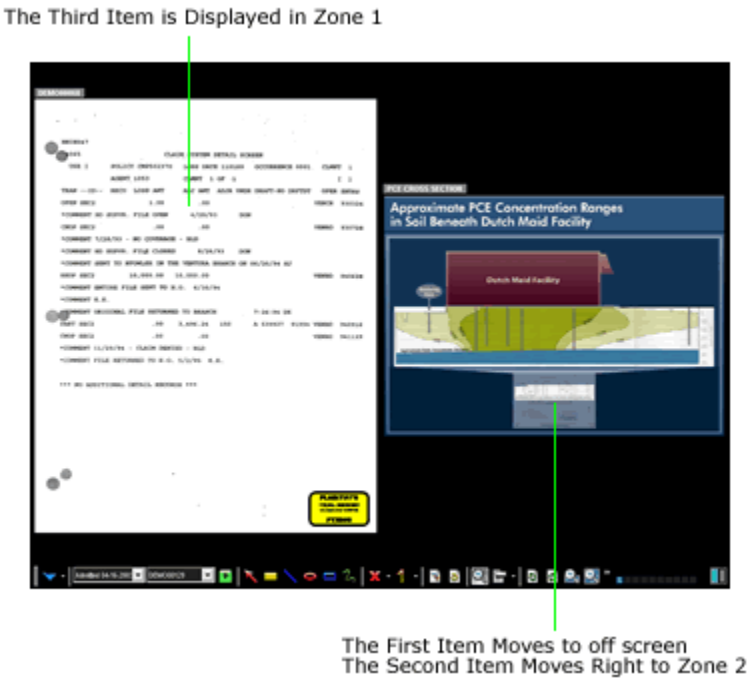


Then load another item into zone 1 by typing the Item ID or scanning the appropriate barcode. The first item loaded into zone 1 will then be moved into zone 2 and the second item will be displayed in zone 1.


The Second Item is Displayed in Zone 1
Approximate PCE Concentration Ranges in Soil Beneath Dutch Maid Facility
The First Item Moves to Zone 2

Continue moving items from left to right successively by typing additional Item IDs or scanning additional barcodes.

If the current item in the active zone (zone 1) is part of a multiple page document, you can move successive pages of the document from left to right by pressing **[Page Down]** or scanning the **[Page Down]** barcode.


The Third Item is Displayed in Zone 1
Approximate PCE Concentration Ranges in Soil Beneath Dutch Maid Facility
The First Item Moves to off screen
The Second Item Moves Right to Zone 2

Vertical Split -- Move Items Right to Left

To move items from right to left, use Add Zone Mode to load successive items into zone 2. The following is a detailed description of the process.

From a blank display, load an item into zone 2 by pressing **[F2]** and then typing the Item ID or scanning the appropriate barcode.

Then load another item into zone 2 by typing the Item ID or scanning the appropriate barcode. The first item loaded into zone 2 will then be moved into zone 1 and the second item will be displayed in zone 2.

Continue moving items from right to left successively by typing additional Item IDs or scanning additional barcodes.

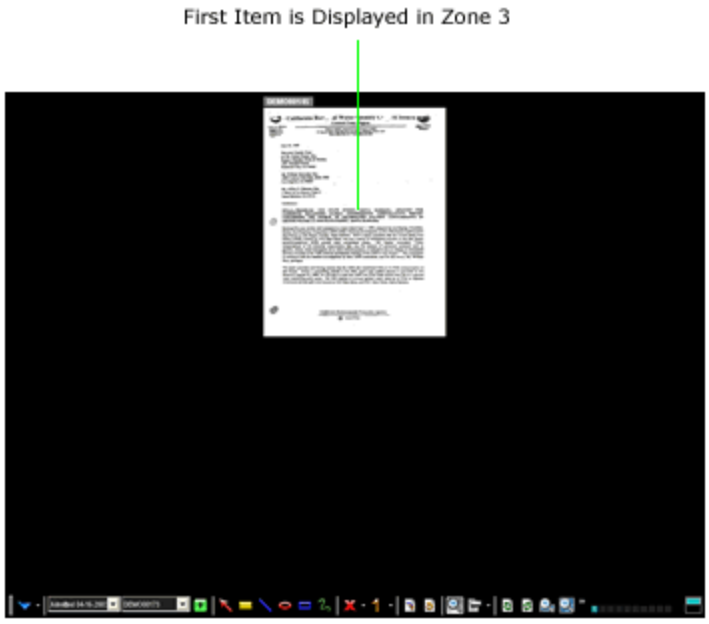
If the current item in the active zone (zone 2) is part of a multiple page document, you can move successive pages of the document from right to left by pressing **[Page Down]** or scanning the **[Page Down]** barcode.

Horizontal Split -- Move Items Top to Bottom

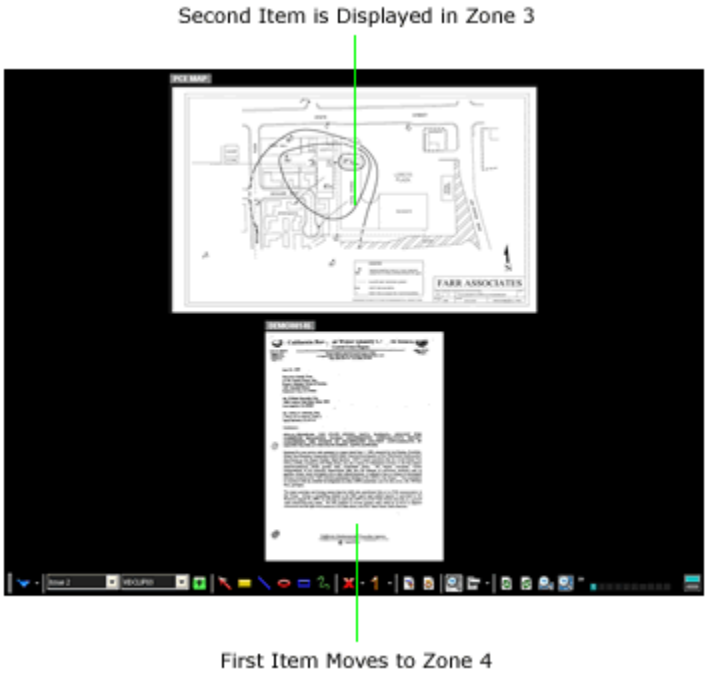
The horizontal split is best suited for landscape images and other items that have greater width than length because of the shape of zones 3 and 4.

To move items from top to bottom, use Add Zone Mode to load successive items into zone 3. The following is a detailed description of the process.

From a blank display, load an item into zone 3 by pressing **[F3]** and then typing the Item ID or scanning the appropriate barcode.



Then load another item into zone 3 by typing the Item ID or scanning the appropriate barcode. The first item loaded into zone 3 will then be moved into zone 4 and the second item will be displayed in zone 3.



Continue moving items from top to bottom successively by typing additional Item IDs or scanning additional barcodes.

If the current item in the active zone (zone 3) is part of a multiple page document, you can move successive pages of the document from top to bottom by pressing **[Page Down]** or scanning the **[Page Down]** barcode.

Horizontal Split -- Move Items Bottom to Top

To move items from bottom to top, use Add Zone Mode to load successive items into zone 4. The following is a detailed description of the process.

From a blank display, load an item into zone 4 by pressing **[F4]** and then typing the Item ID or scanning the appropriate barcode.

Then load another item into zone 4 by typing the Item ID or scanning the appropriate barcode. The first item loaded into zone 4 will then be moved into zone 3 and the second item will be displayed in zone 4.

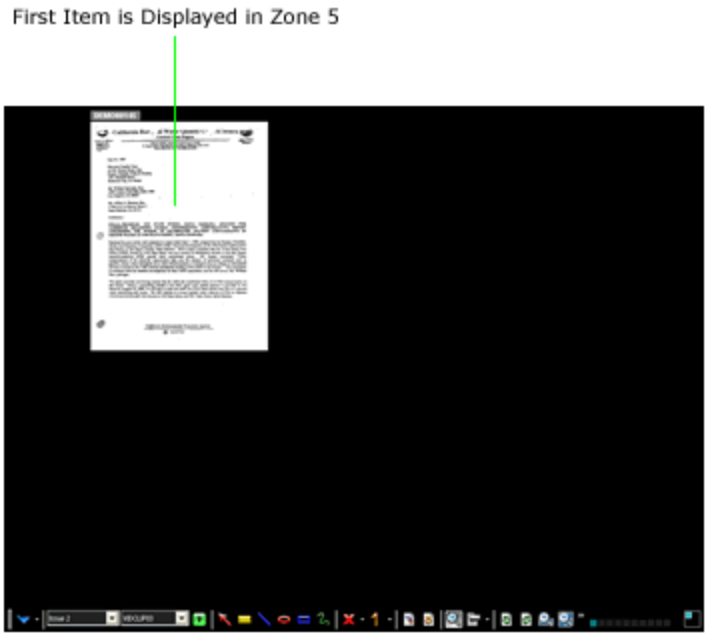
Continue moving items from bottom to top successively by typing additional Item IDs or scanning additional barcodes.

If the current item in the active zone (zone 4) is part of a multiple page document, you can move successive pages of the document from bottom to top by pressing **[Page Down]** or scanning the **[Page Down]** barcode.

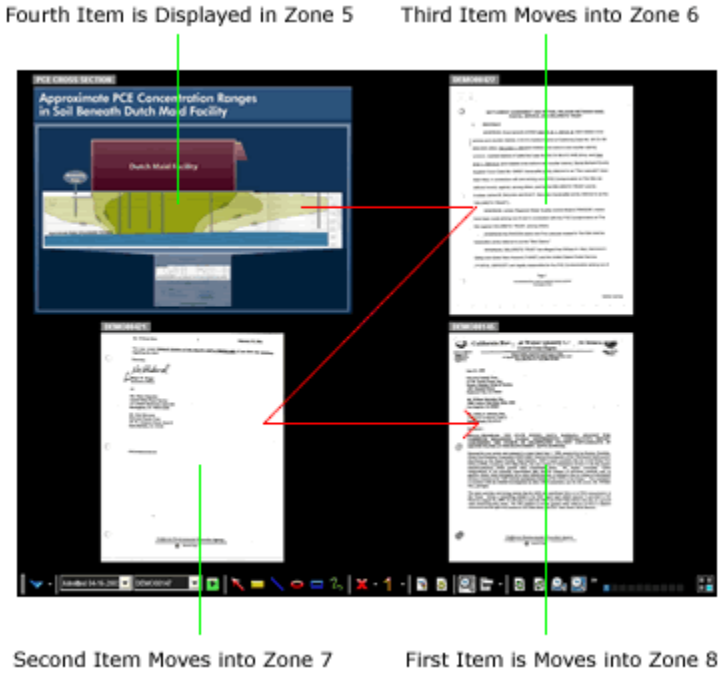
Move Items Through the Quadrants

The screen can be split into quadrants to show up to four items at the same time. To move items through the quadrants, use Add Zone Mode to load successive items into any of the four quadrants. Item movement through the quadrants is different than the horizontal or vertical split because the items move in one direction only -- from the upper left corner toward the bottom right corner. The following is a detailed example of the process.

From a blank display, load an item into zone 5 by pressing **[F5]** and then typing the Item ID or scanning the appropriate barcode.



Continue loading items into zone 5 until the first item appears in zone 8. If the item in the active zone (zone 5) is part of a multiple page document, you can move successive pages of the document through the quadrants by pressing **[Page Down]** or scanning the **[Page Down]** barcode.


Fourth Item is Displayed in Zone 5
Third Item Moves into Zone 6
Approximate PCE Concentration Ranges in Soil Beneath Dutch Maid Facility
Second Item Moves into Zone 7
First Item is Moves into Zone 8

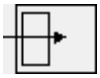
As you add new items into zone 5, the old item moves first into zone 6, then 7, then 8, then off the display. If you add items into zone 6, they move through 7 and 8, etc., while the item in zone 5 remains in the same place.

More Information:

- Presentation Mode
- Control the Presentation Display
- Zones

Table of Zone Activity in Add Zone Mode

The following table defines the activity that occurs in each zone as items are loaded using Add Zone Mode.

	Active Zone	Activity
	**Zone 1**	When using vertical split, moves old item right into zone 2
	Zone 2	When using vertical split, moves old item right into zone 1
	Zone 3	When using vertical split, moves old item right into zone 4
	Zone 4	When using vertical split, moves old item right into zone 3
	Zone 5	When using a quadrant split, moves old item right into zone 6, which moves 6 to 7, which moves 7 to 8, which moves 8 off the screen
	Zone 6	When using a quadrant split, moves old item diagonally down into zone 7, which moves 7 to 8, which moves 8 off the screen
	Zone 7	When using a quadrant split, moves the old item right into zone 8, which moves 8 off the screen
	Zone 8	When using a quadrant split, new item replaces old item in zone 8
	Zone 9	New item replaces old item

The last zone activated controls the motion of the items on the screen.

Note: *New items are automatically added into the next logical available zone until all quadrant zones are occupied (or another zone command entered by the user).*

The zone receiving new items moves the existing item into other available zones (unless you are in Replace Zone Mode).

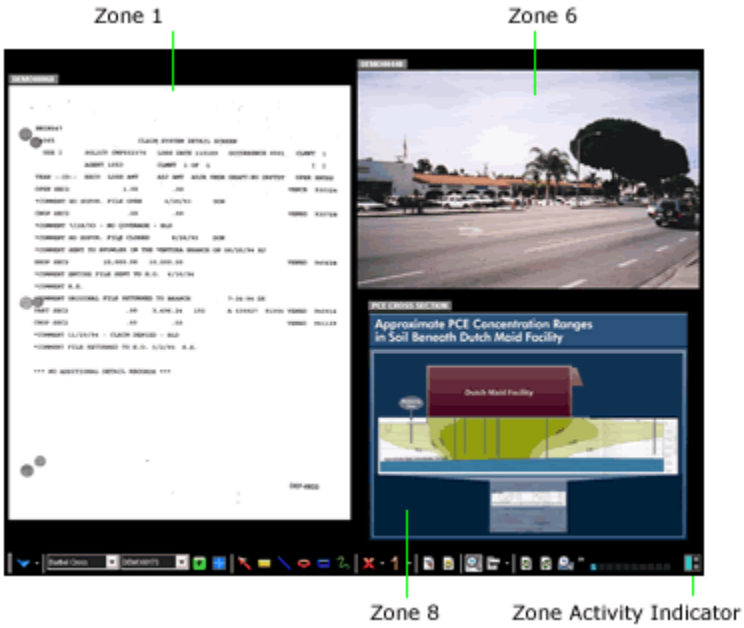
More Information:

- Control the Presentation Display
- Zones

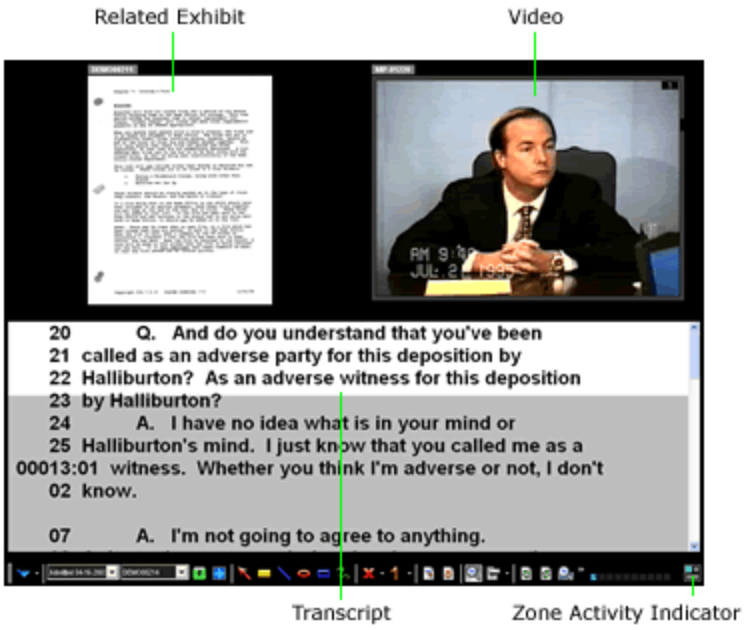
Zone Combinations

Zones can be combined to display items exactly as you would like.

For example, you could use zone 1 for a document and zones 6 and 8 for graphics, as shown in the figure below.



You could also load a Digital Video Transcript clip and use the open zone to display a related exhibit, as shown in the figure below.


Related Exhibit
Video
20 Q. And do you understand that you've been
21 called as an adverse party for this deposition by
22 Halliburton? As an adverse witness for this deposition
23 by Halliburton?
24 A. I have no idea what is in your mind or
25 Halliburton's mind. I just know that you called me as a
00013:01 witness. Whether you think I'm adverse or not, I don't
02 know.
07 A. I'm not going to agree to anything.
Transcript
Zone Activity Indicator

Most zone combinations are possible, with the exception of the following:

- Zone 1 with zones 3, 4, 5 or 7
- Zone 2 with 3, 4, 6 or 8
- Zone 3 with 1, 2, 5 or 6
- Zone 4 with 1, 2, 7 or 8
- Zone 9 with any other zone

You cannot overlap zones.

More Information:

- Zones

Zone Modes

The way items move around the screen is largely determined by the active zone mode. The three zone modes are Add Zone, Replace Zone and Transfer Zone. This section describes the functionality of each of the zone modes:

Mode	Description
Add Zone **[F11]**	The Add Zone Mode, which is the default mode, allows you to add an item to a specific zone. If you add an item to a zone that is already displaying an item, the old item is moved into another zone (unless you are

	adding an item into zone 9, which cannot be used concurrently with any other zone). For example, adding an item into zone 1 will automatically move the item previously in zone 1 into zone 2. Any item previously in zone 2 will be moved off the display. (See Also: Table of Zone Activity in Add Zone Mode)
Replace Zone **[F12]**	The Replace Zone Mode allows you to replace the item in the active zone with a new item while leaving items in other zones in place. A small blue bar, called the Replace Zone Indicator, appears in the lower-right corner of the Presentation display when Replace Zone Mode is active. For example, if zone 6 is displaying a video and zone 1 is displaying a related document, select Replace Zone Mode before paging down in zone 1 to prevent the video from being closed and moved off the display by the new page. See Also: Using Replace Zone Mode)
Transfer Zone **[F10]**	The Transfer Zone Mode allows you to transfer the item in the active zone into another zone. (See Also: Transfer Zone Mode)

More Information:

- Control the Presentation Display
- Zones

Transfer Zone Mode

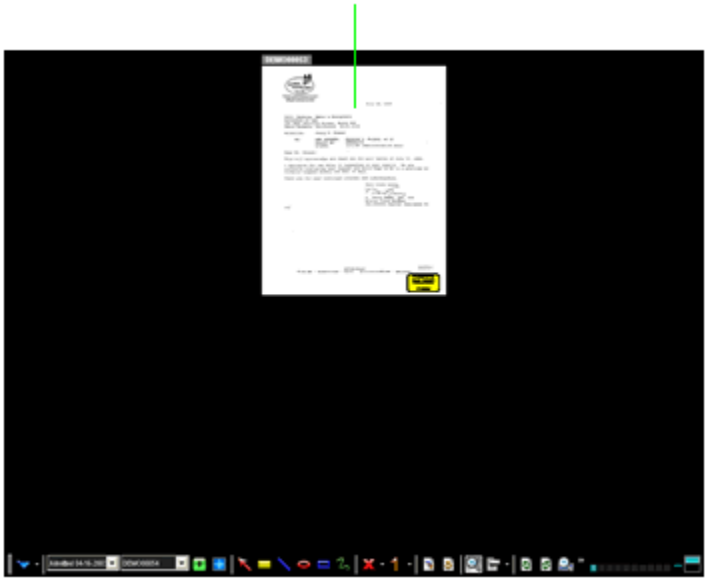
Transfer Zone Mode allows you to move items from one zone to another. The following is an example of the process.

From a blank display, load an item into zone 9 by pressing **[F9]** and then typing the Item ID or scanning the appropriate barcode.

Item in Zone 9

Transfer the item into zone 3 by pressing **[F10]** to enter Transfer Zone Mode and then pressing **[F3]** to move the item into zone 3.

Item Transfered to Zone 9



After one transfer is made in Transfer Zone Mode, TrialDirector reverts back to Add Zone Mode or Replace Zone Mode, depending on which one was most recently enabled.

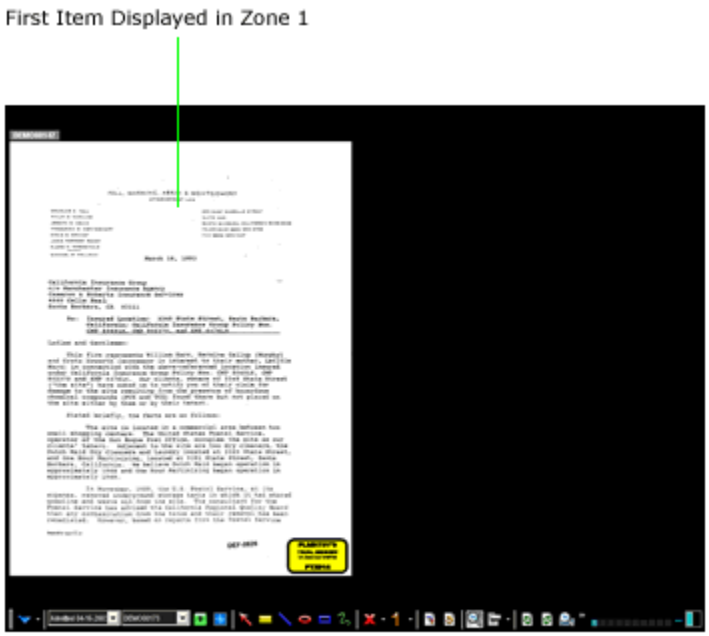
More Information:

- Control the Presentation Display
- Zones

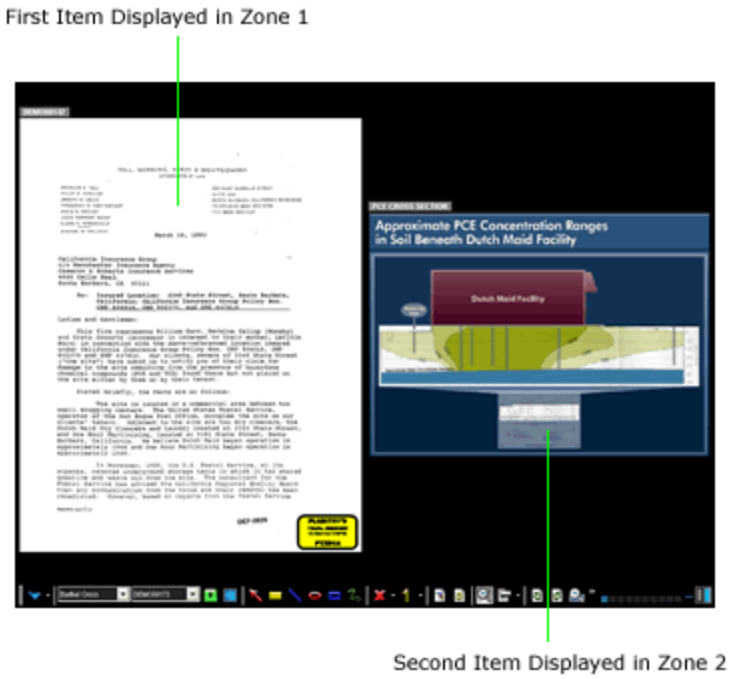
Using Replace Zone Mode

When you are using multiple zones, Replace Zone Mode allows you to replace an item in one zone with a new item while leaving items in other zones in place. The Replace Zone Mode should be used when paging through revisions or overlays because it paints the new item on top of the old item. As a result, the markups will smoothly appear on the image. The following is a detailed example of the process.

Load an item into zone 1 by pressing **[F1]** and then typing the Item ID or scanning the appropriate barcode.

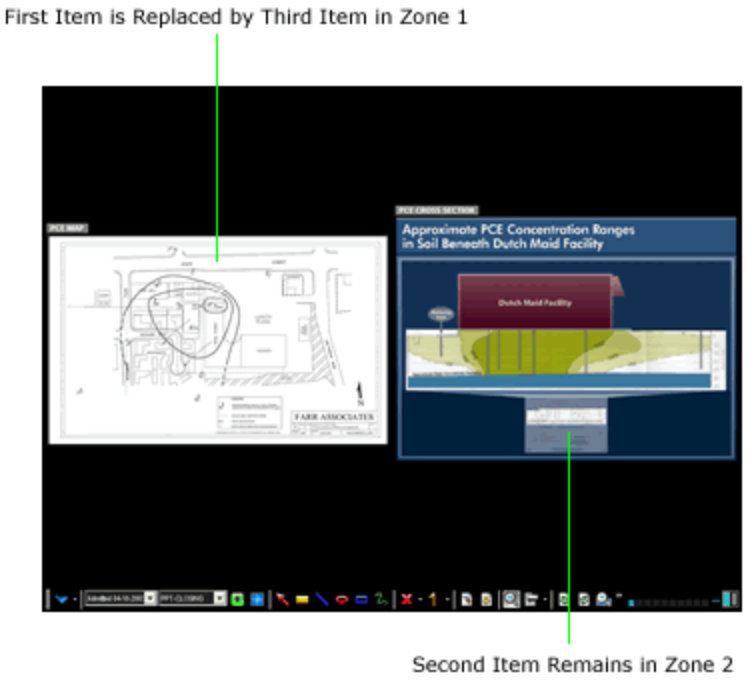


Then load an item into zone 2 by pressing **[F2]** and then typing the Item ID or scanning the appropriate barcode.


First Item Displayed in Zone 1
Approximate PCE Concentration Ranges in Soil Beneath Dutch Maid Facility
Second Item Displayed in Zone 2

Replace the item in zone 1 with a new item by pressing **[F1]** to make zone 1 active, pressing **[F12]** to select the Replace Zone Mode, and then typing the Item ID or scanning the appropriate barcode. A small blue bar will appear in the lower-right corner of the screen to indicate that you are in Replace Zone Mode (see Replace Zone Indicator).

If the item in the active zone (zone 1) is part of a multiple page document, you can replace the item with successive pages of the document by pressing **[Page Down]** or scanning the **[Page Down]** barcode.


First Item is Replaced by Third Item in Zone 1
Approximate PCE Concentration Ranges in Soil Beneath Dutch Maid Facility
Second Item Remains in Zone 2

Replace Zone Mode will remain the active mode until you enter a different mode.

More Information:

- Control the Presentation Display
- Zones

Zone Commands

The zone commands allow you to manipulate items on the presentation display using a keyboard or barcode reader.

What do you want to do?

- Learn About Zone Modes
- Use Add Zone Mode
- Use Replace Zone Mode
- Use Transfer Zone Mode
- Expand or Retract a Zone

More Information:

- Control the Presentation Display
- Zones

Zone Header Controls

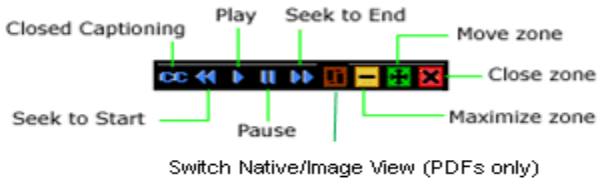
Topics:

- Switch Between Image/Native View (PDFs Only)
- Expand a Zone
- Drag an Item into Another Zone
- Zone Header Video Controls
- Close an Item

Zone header controls can be used to expand an item within a zone, drag and drop an item from zone to zone, or close an item. The zone header controls also allow you to carry out basic video control operations.

1. To open the zone header controls, first ensure zone headers are enabled on the in the Presentation Options window.
2. Load an item onto the presentation display.
3. Position the mouse pointer over the extreme upper-right corner of the item.

The zone header controls appear above the image, as shown in the figure below.



Note: The Zone Header Video controls only become visible if the exhibit item in that zone is a video file format.

An additional button is available when you view a Native file (for example, a Word or Excel file):

When you click this button the document is enlarged and the toolbars are hidden.

Switch Between Image/Native View (PDFs Only)

When you load a page from a PDF file in Presentation mode, a static image of the page appears, enabling you to annotate it for trial as needed. However, you can quickly switch to Native view to access the complete, fully functional PDF. This is helpful if you need to search for a word or phase in the file, go to a specific page using thumbnail images, or use any of the other available PDF tools.

Note: Annotations made in Image view are not saved when you switch to Native view. Pre-treating images or using the Snapshots button on the Presentation Toolbar provide alternatives.

To switch the view, click the **Switch Native / Image View** button on the zone header controls.

Expand a Zone

To expand a zone, click the **Maximize Zone** button on the zone header controls.

To retract an expanded item, click the **Maximize Zone** button again.

Drag an Item into Another Zone

1. To move an item into another zone, position the cursor over the **Click and Drag To Move Zone** button on the zone header controls until the four-sided arrow appears.
2. Click and drag the mouse pointer to the center of the zone where you want the item to be displayed.
3. Check the Zone Activity Indicator to ensure that the target zone is selected, as indicated by a white outline.
4. Release the mouse.

The item will move to the selected zone.

Zone Header Video Controls

The Zone header video controls provide basic controls whilst using video exhibits. The controls available are:

- Play
- Pause
- Seek to Start
- Seek to End
- Show/hide Closed Captioning

Close an Item

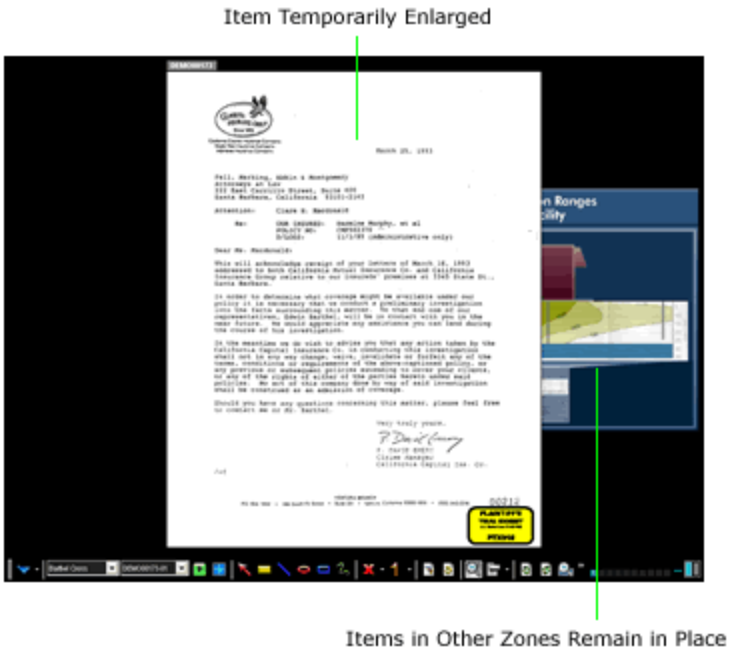
To close an item, click the **Close Zone** button on the zone header controls.

More Information:

- Control the Presentation Display
- Display Items

Expand or Retract Zones

To temporarily enlarge a zone to fill the entire screen without clearing the items in other zones, press **[Shift] + [Insert]** or enter the Expand Zone (**-ZE**) command and press **[Enter]**. The active zone will expand to fill the entire display as shown in the figure below.



To retract the active zone, press **[Shift] + [Delete]** or enter the Retract Zone (**-ZR**) command and press **[Enter]**.

More Information:

- Control the Presentation Display
- Zones

Control the Presentation Display

TrialDirector allows you complex control of the items on the Presentation Display. By selecting specific zones and using different zone modes, you can control where items are displayed and how they move around the Presentation Display.

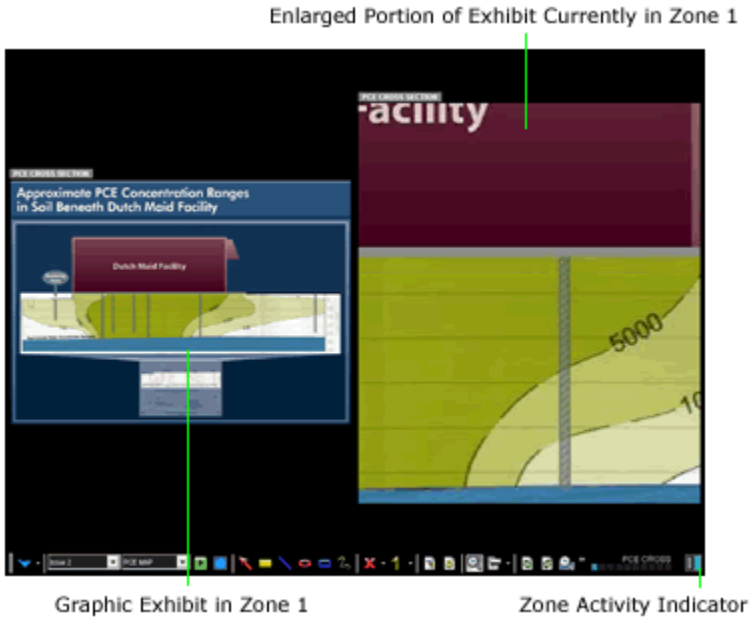
More Information:

- Display Items
- Zone Header Controls
- Zone Commands
- Scripts
- Admit Trial Exhibits

- Tandem Exhibit Presentation

View Images

When you load a document or photograph into TrialDirector, the image is displayed as large as possible in the selected zone. If the image is part of a multiple page document, additional pages of the document can be viewed by pressing the **[Page Up]** and **[Page Down]** keys.


Enlarged Portion of Exhibit Currently in Zone 1
Approximate PCE Concentration Ranges in Soil Beneath Dutch Maid Facility
5000
Graphic Exhibit in Zone 1
Zone Activity Indicator

Any displayed image can be annotated, enlarged and rotated using the presentation tools (see the Presentation Toolbar).

Changes made to the image while in the Presentation mode *are not* permanent. However, you can print or save the entire Presentation Display or a particular zone using the print and grab commands.

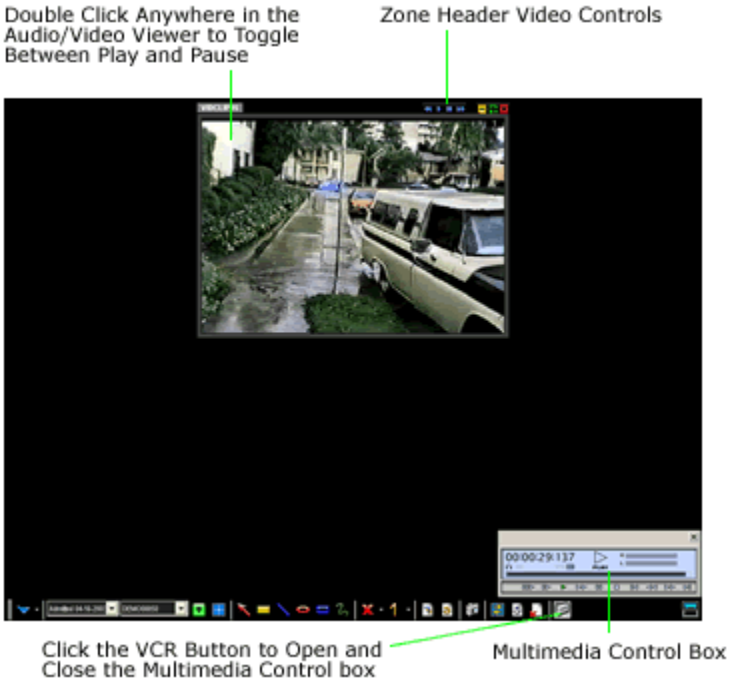
More Information:

- Zones

View Multimedia Files

When you load a multimedia file in Presentation mode, TrialDirector will either begin playback or wait for the playback command, depending on the preference selected (see Presentation Preferences).

Multimedia files can be moved around the Presentation Display the same way images are moved (see Control the Presentation Display), and you can play up to four videos simultaneously as long as one of them is a digital video transcript.


Double Click Anywhere in the Audio/Video Viewer to Toggle Between Play and Pause
Zone Header Video Controls
Click the VCR Button to Open and Close the Multimedia Control box
Multimedia Control Box

To toggle between pause and play, double-click anywhere on the Multimedia Viewer.

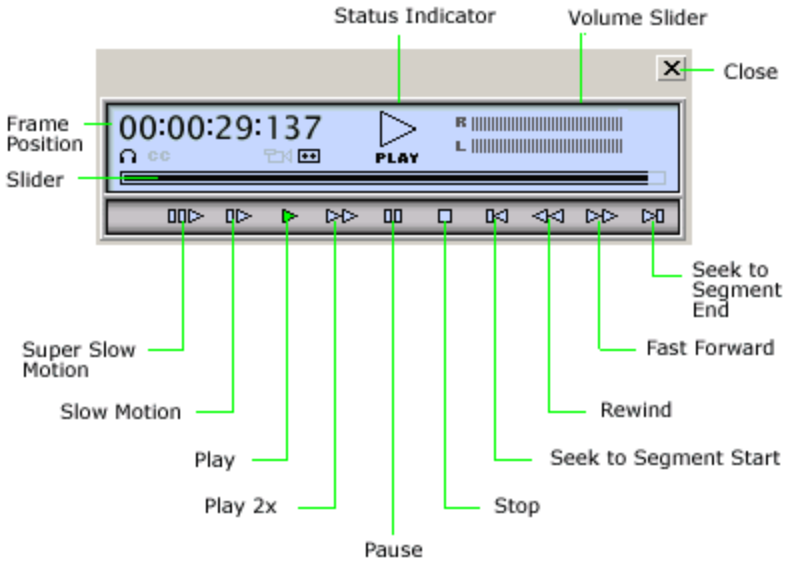
For further control, you can do one of two things:

1. Click the VCR button on the toolbar to display the Multimedia Control Box at the bottom, as shown above. (To close the Multimedia Control Box either click the VCR button again or click the **[X]** located at the top right hand side of the Multimedia control box.)

2. Activate and use the Zone Header Video controls located at the top right hand side of the zone.

The Multimedia Control Box

The Multimedia Control Box, which can be opened by clicking the dark gray box around the Multimedia Viewer, allows you to play, pause, rewind and adjust the volume level of the current multimedia in the Multimedia Viewer. A diagram of the controls is shown below.



Any buttons or icons on the Multimedia Control Box that are not explained cannot be used in the Presentation Module.

Note: *See Appendix E for a detailed description of each multimedia control.*

More Information:

- Zones

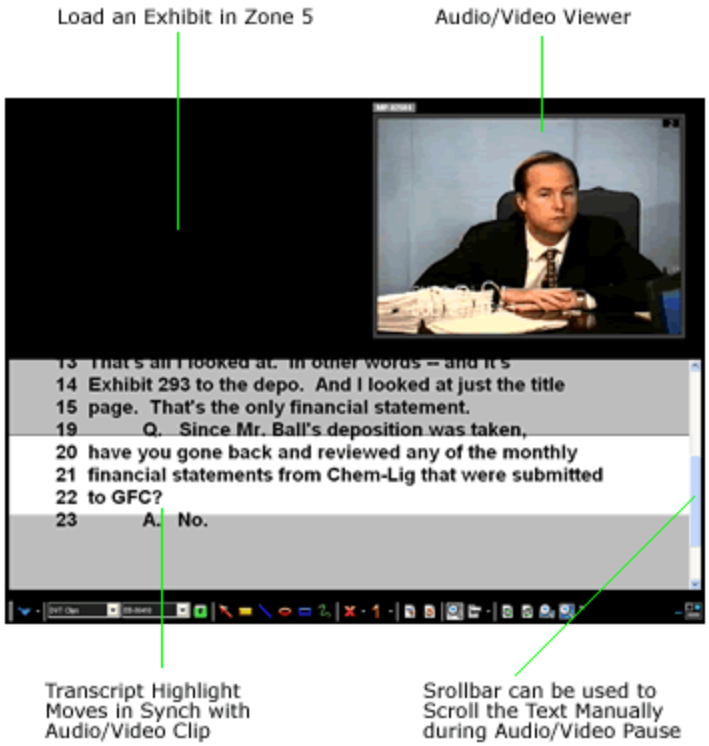
View Digital Video Transcript Clips

Topics:

- Enable Closed Captioning
- Advance Clip Segments
- Customize Transcript Appearance
- Change the font
- Change the Line Spacing

When you load a DVT clip in Presentation mode, TrialDirector will either begin playing the Digital Video Transcript or wait for the user command to begin playback, depending on the Presentation Play option selected (see Presentation Options).

By default, the multimedia appears in zone 6 and the transcript appears in zone 4, leaving zone 5 available for a document or photograph, as shown below.


Load an Exhibit in Zone 5
Audio/Video Viewer
14 Exhibit 293 to the depo. And I looked at just the title
15 page. That's the only financial statement.
19 Q. Since Mr. Ball's deposition was taken,
20 have you gone back and reviewed any of the monthly
21 financial statements from Chem-Lig that were submitted
22 to GFC?
23 A. No.
Transcript Highlight Moves in Synch with Audio/Video Clip
Srollbar can be used to Scroll the Text Manually during Audio/Video Pause

If you make zone 1 active before opening the DVT clip (using the -z1 command), the transcript will appear in zone 1, while the multimedia will continue to appear in zone 6. This leaves zone 8 available for documents or photos.

When using the multimedia controls to jump to different positions in the multimedia, the transcript text is automatically repositioned when play is resumed.

Note: *See Multimedia Control Box for information on using the multimedia controls.*

Enable Closed Captioning

To enable closed captioning, enter the closed captioning command (**-CC**). The transcription will appear at the bottom of the video, as shown below.

2
Q. Since Mr. Ball's deposition was taken,
have you gone back and reviewed any of the monthly
financial statements from Chem-Lig that were submitted
Closed Captioning

Enter the closed captioning command again to disable closed captioning.

Advance Clip Segments

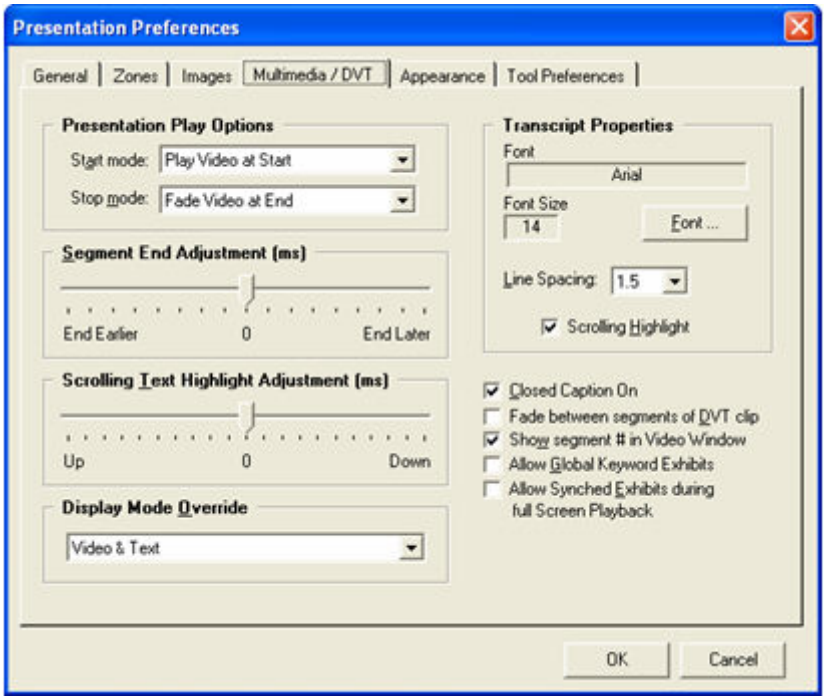
To manually advance segments when presenting a clip, press **[Shift] + [F12]**.

Current Segment Number
2
Q. Since Mr. Ball's deposition was taken,
have you gone back and reviewed any of the monthly
financial statements from Chem-Lig that were submitted

Use the arrow buttons to advance to the next segment or rewind to the previous segment.

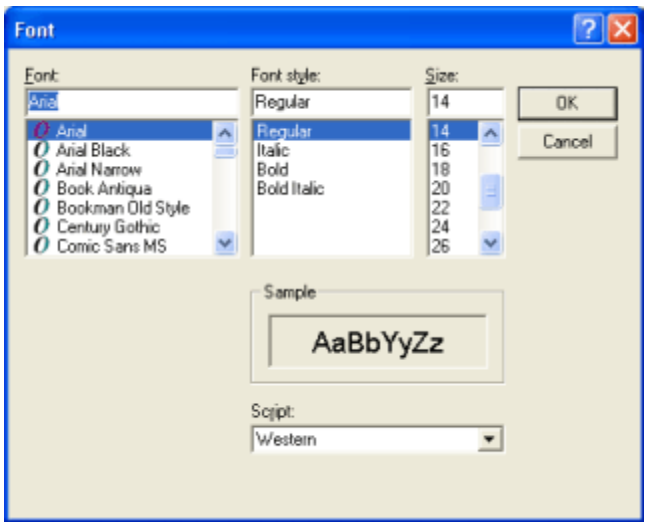
Customize Transcript Appearance

1. To customize the appearance of the transcript, select **Presentation Options** from the View menu.
2. Select the Multimedia/DVT tab to display the Transcript Properties, as shown in the figure below.



Change the Font

To change the font, click the **[Font]** button.



Change the font, font style, and font size, as desired, and click **[OK]** to save the changes or **[Cancel]** to abandon the changes.

Change the Line Spacing

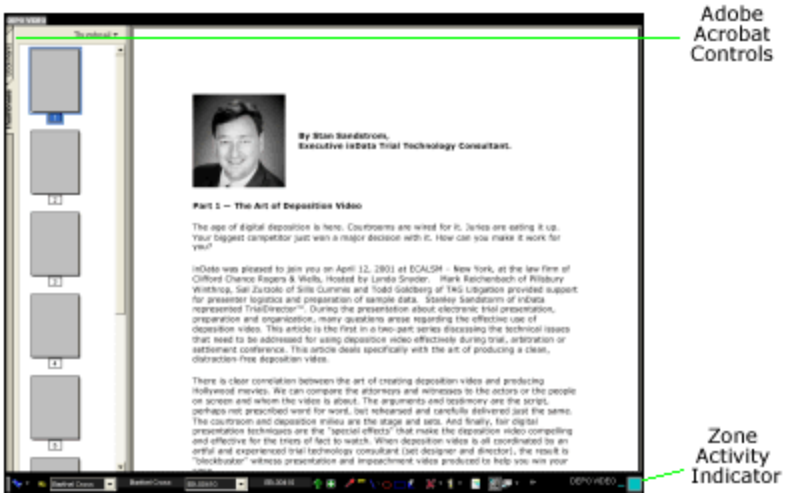
To change the line spacing of a transcript, set the Line Spacing option to SINGLE, 1.5, or DOUBLE.

More Information:

- Zones

Presentation Mode - View Native (OLE) Files

TrialDirector displays Native files in Presentation mode using the appropriate program or viewer. See Appendix D - Supported File Formats for a complete list of supported Native file types.



TrialDirector allows you to use the OLE compliant software controls within Presentation mode to manipulate the Native format files. When you click on a Native file, the focus is transferred to the embedded application (i.e., the embedded application becomes active). Left-click on the Zone Activity Indicator to transfer the focus back to TrialDirector.

Note: You cannot use TrialDirector annotation tools to annotate Native files. Annotate Native files using the application the files were created in.

Manipulate 3D Objects

Three-dimensional objects can be imported into TrialDirector as OLE objects and presented and manipulated in Presentation Mode.

1. Load a three-dimensional OLE object onto the presentation display.
2. Position your cursor over the object.
3. Do one of the following:

    - Click and hold the left mouse button and move the mouse around to manipulate the object.
    - Click once to trigger the action associated with a "hot spot" (such as opening a door).

Both actions are illustrated in the figure below.

Release the mouse button.

The object remains in the new position.

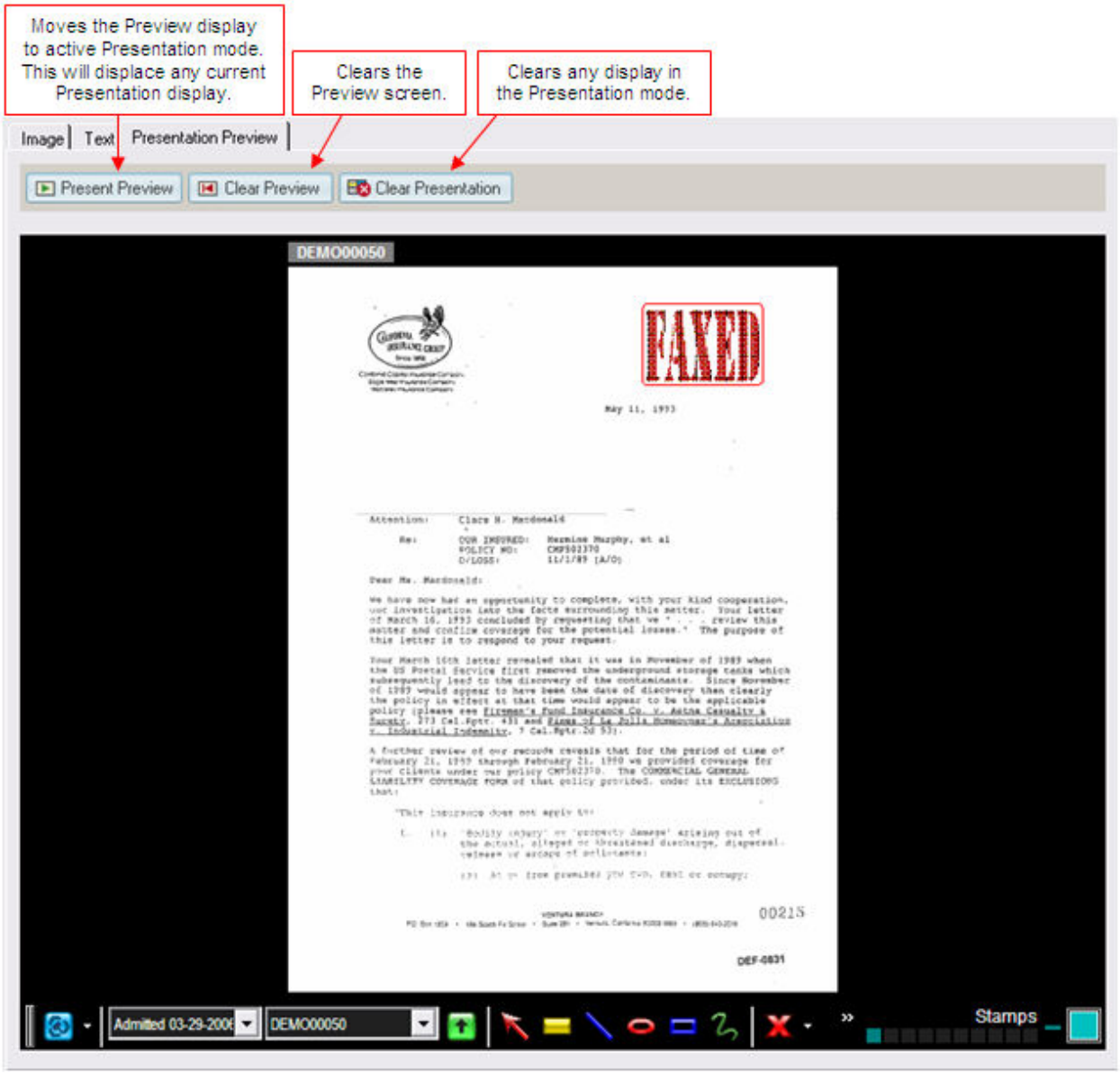
More Information:

- Zones

Using Presentation Preview

The Presentation Preview function allows you to prepare and preview on-the-fly enhancements to your presentation without impacting an on-going presentation. Suppose a need arises to present information in a different way during trial... With Presentation Preview, you (or an associate) can prepare an alternate item for presentation. At the proper moment, a simple mouse-click inserts the new information into the live presentation, replacing the current display. You've prepared, previewed and presented the new information, and the jury never saw you miss a beat.

Presentation Preview is accessed from the Case Library tab. Using the documents, multimedia, and video transcripts in the Case Explorer and the Workbooks Explorer, you can prepare, preview, and modify a new presentation screen, including any desired markups or callouts.



Preparing an Alternate Screen

The Presentation Preview display in the Case Library operates just like the basic presentation mode, including having a customizable toolbar. You prepare display items just as you would in Presentation mode. For example, as you drag an item to the preview screen, the Zone Activity Indicator in the lower right corner shows where the item will be displayed. When the desired zone appears, release the mouse and the item will appear in that zone.

- You can prepare the displayed items for presentation using the full Presentation mode tool set, and all of your notations will appear when the preview is transferred to active Presentation mode. Video and transcripts will present just as shown.

- When you click on a document or other item in the Case Explorer tree, it will automatically display the item in the middle (Zone 9) of the Presentation Preview screen. As an option, you can disconnect the Case Explorer tree from the Presentation Preview Viewer by clicking on the Connect/Disconnect button at the top of the screen. This will prevent items in the Case Explorer tree from automatically displaying in Presentation Preview when clicked on. You can still drag-and-drop any item from the Case Explorer tree into the Presentation Preview viewer, even while the Case Explorer tree is disconnected.
- You can also drag-and-drop items from the Case Explorer tree into the Presentation Preview, which is especially handy when working with zones.
- The Presentation Preview comes with a default toolbar that is separate from the standard Presentation toolbar. You can customize either toolbar by adding/removing buttons you commonly use, and save the toolbar layout. You can always load the default toolbar layout or other saved toolbar layouts at any time. The program opens the last toolbar layout used.
- When presenting exhibits from Presentation Preview, the toolbar and other visual cues (e.g. zone indicator) at the bottom of the active presentation screen are automatically hidden to prevent distractions to the jury. You can always display these tools on the presentation screen by clicking on the Hide Toolbar\Menus toggle button at the bottom of the presentation screen
- To clear the preview screen and start over, simply click **Clear Preview**. The preview screen clears, and all displayed data is lost.

Note: Native file documents, such as Microsoft Word or PowerPoint, will open to page one when transferred to active Presentation mode. If a specific page is desired, be prepared to move to that page after transferring the preview screen.

Transferring the Preview to Active Display

When you are satisfied with the preview, click **Present Preview**. The information in the preview screen will overwrite whatever is displayed in the active Presentation. (If Presentation mode is not currently active, clicking Present Preview will launch the Presentation mode and present the information.)

To clear the current active presentation before displaying the preview, click **Clear Presentation**, then click **Present Preview**.

Continuing with the Presentation

Following the presentation of the preview information, the active presentation will continue from the next scheduled screen using the standard controls.

More Information:

- Control the Presentation Display
- Presentation Toolbar

Drag and Drop Items onto the Display

When using dual screens, you can drag and drop items onto the presentation display.

1. On the primary screen, do one of the following:

- Click on the desired item in the Document Manager Case Explorer.
- Click on the desired item in the Microsoft Windows Explorer.

Note: *The item must be a supported file format.*

2. Drag the selected item over to the presentation display on the secondary screen.
3. Center your cursor over the zone where you want to display the item. Look at the Zone Activity Indicator to ensure that the desired zone is selected, as indicated by a white outline.
4. Release the cursor.

The item appears in the selected zone.

More Information:

- Control the Presentation Display
- Display Items

Display Items

In the Presentation mode, items can be loaded onto the presentation display using a variety of methods.

By default, items are loaded into zone 9 if no other zones are selected. You can load items into other zones by selecting a zone using the Zone commands (see Zones).

If the volume where the item file exists is not found, a prompt will appear in the lower-right corner, indicating which volume to load.

What do you want to do?

- Drag and Drop Items onto the Display
- Load Items Using a Keyboard

- Load Items Using a Barcode Reader
- Load Items Using the Item Toolbar
- Load Items Using a Script

More Information:

- Control the Presentation Display
- Display Items

Load Items Using Barcode Reader

To load an item using a barcode reader, scan the barcode associated with the item.

The scanned item appears in the selected zone, indicated by a white outline.

More Information:

- Control the Presentation Display
- Display Items

Load Items Using a Keyboard

Topics:

- Load by Item ID
- Load by URL
- Load by Exhibit Number
- Load by Trial Exhibit Number
- Load by Macro
- Create a Macro
- Execute a Macro

You can use the keyboard to load items into the Presentation Module by Item ID, URL (web address), Exhibit number, or Trial Exhibit number.

Load by Item ID

To load an item by Item ID, simply type the Item ID and press **[Enter]**. The Item ID will appear in the lower-right corner as you type it.

Load by URL

TrialDirector allows you to type in a live web address (URL) and navigate a web site from the presentation display. To load an item by URL, type in the full web address, beginning with "www." and press **[Enter]**.

Note: *The web address must begin with three W's followed by a period in order for TrialDirector to load the web site.*

Load by Exhibit Number

To load an item by Exhibit Number, simply type the Exhibit Number as it exists in the Document Director Case Explorer.

Note: *The Exclamation point is no longer required or used to load items by an Exhibit Number*

For example, if you define an item as Exhibit Number Ex001, you can load it into TrialDirector by entering the command **Ex001.**

Load by Trial Exhibit Number

To load an item by Trial Exhibit Number, simply type the Exhibit Number as it exists in the Document Manager Case Explorer.

Note: *The pound character (#) is no longer required or used to load items by a Trial Exhibit Number.*

For example, if you define an item as Trial Exhibit Number Ex001, you can load it into Presentation mode by entering the command **Ex001.**

Load by Macro

Macros allow you to quickly enter a frequently used string of characters (such as "exh") by pressing a hot key.

Create a Macro

To create a macro, enter the characters you would like to save and press **[Ctrl] + [function key]** you would like to associate the macro with (F1 through F4).

For example, type **exh** and press **[Ctrl] + [F1]** to save **exh** as the F1 macro.

Execute a Macro

To execute a macro, press **[Shift] + [function key]** that the macro is associated with (F1 through F4). The characters that were assigned to that macro will appear in the lower-right corner of the Presentation Display.

For example, press **[Shift] + [F1]** to execute the F1 macro.

More Information:

- Control the Presentation Display
- Display Items

Load Items Using a Script

To load an item using a script,

1. Type the name of the script and press **[Enter]**.
2. The script will loop until you press **[Esc]**

More Information:

- Control the Presentation Display
- Display Items

Load Items Using the Item Toolbar

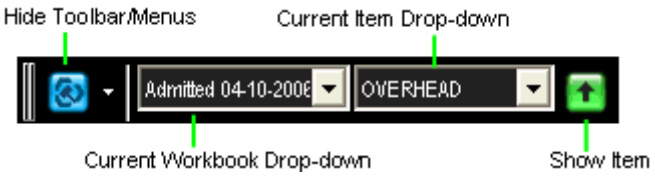
The Item Toolbar can be used to select workbook items and easily load them onto the presentation display using the Zone Selectors.

Topics

- The Default toolbar settings
- Viewing and selecting Workbooks
- Viewing and selecting Items in a Workbook
- Changing the Toolbar Settings
- Loading Items onto the presentation
- Toolbar Zone Controls

The Default toolbar settings

The default toolbar settings for when the software is first installed is shown below

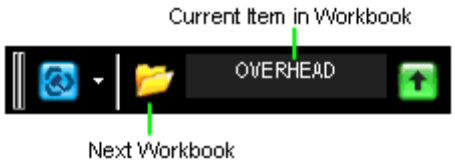


Viewing and Selecting Workbooks

There are three ways to navigate workbooks:

1. Next Workbook
2. Current Workbook Drop-down
3. Current Workbook Button

Next Workbook



Clicking the workbook icon on the toolbar will cycle through the available workbooks. The first item in the workbook is shown to its right.

Current Workbook Drop-down

The Workbook Drop-down list allows you to see all of the workbooks that are available to the presentation. Select the workbook from where you wish to select Items. The first Item in the workbook will be shown to right when you first select that workbook.

Current Workbook Button

The Current Workbook Button allows you to cycle back and forth by using either left or right mouse clicks on the button.

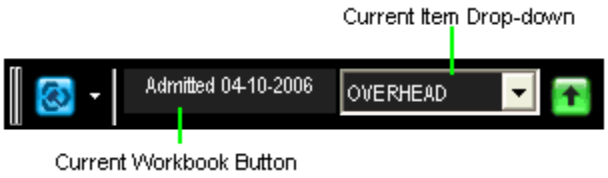
- Each left mouse click on the button will move one place forward through the workbook list.
- Each right mouse click on the button will move one place back through the workbook list.

Viewing and Selecting Items in a Workbook

There are two ways to view and select and item in presentation mode:

1. Current Item Drop-down
2. Current Item Button

Current Item Drop-down



The Item Drop-down list allows you to see all of the Items that are available in the workbook that is currently active. Select the Item that you wish to load.

Current Item Button

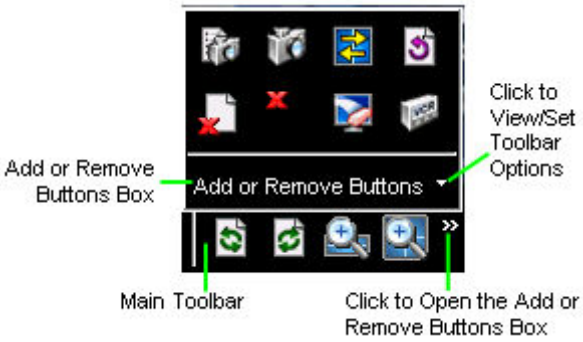
The Current Item Button allows you to cycle back and forth by using either left or right mouse clicks on the button.

- Each left mouse click on the button will move one place forward through the Item list.
- Each right mouse click on the button will move one place back through the Item list.

Changing the Toolbar Settings

Tools can be added or removed from the tool bar. By clicking the

button, found on the right side of the last tool icon on the toolbar, the "Add or Remove Buttons dialog box, shown below, is activated. Click the arrow on the right hand side to display a drop down list which contains all the available tool and menu items.


Add or Remove Buttons Box
Add or Remove Buttons
Click to View/Set Toolbar Options
Main Toolbar
Click to Open the Add or Remove Buttons Box

Loading Items onto the Presentation

To load the selected item, click the green up arrow, as seen below

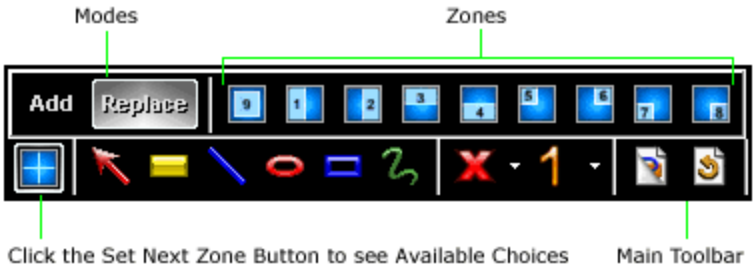
To load the previous item, click the green down arrow, as seen below

Toolbar Zone Controls

By clicking the **Set Next Zone** button, you can set the way that items are loaded into the presentation area.

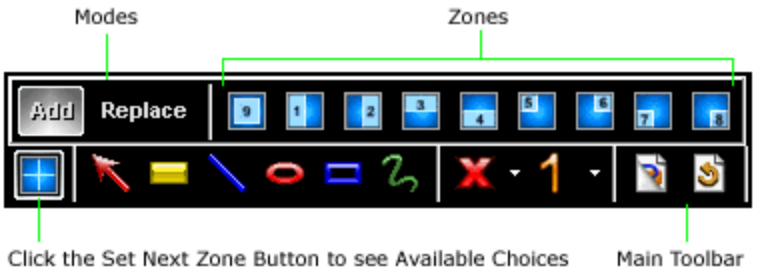
There are two modes available:

- Replace Zone Mode



The Add Zone Mode places the next Item to be loaded into the first zone, moving any other exhibits into the next available active zone. If there is no active zone available, the Item moves off the presentation screen.

- Add Zone Mode



The Replace Zone Mode places the next Item to be loaded into the current active zone removing any existing exhibit and/or any zones that the zone selected needs to cover.

More Information:

- Control the Presentation Display
- Display Items

Enlarge Images

Topics:

- Standard Zoom
- Zoom to Top
- Zoom to Bottom
- Rubber-band Zoom
- Fill Zone Zoom
- Area Projection Zoom
- Pan an Enlarged Image

There are several ways to enlarge an image in Presentation mode:

- Enlarge and reduce an image relative to the center of the zone using the standard zoom.
- Enlarge an image as much as possible in a zone relative to the top or bottom of the item using the zoom commands.
- Enlarge and center an area using the Rubber-band zoom.
- Enlarge an area to fill the entire zone using the Fill Zone zoom or project an area using the Area Projection tool.

Note: *If you use the standard, Rubber-band, or Fill Zone zoom, the zoom will be retained when you page up or page down, but the zoomed area will begin at the top of the next image.*

Standard Zoom

The standard zoom allows you to use the **[insert]** and **[delete]** keys to enlarge or reduce an image in the active zone relative to the center of the zone, as shown in the figure below.

Item before enlargement Enlarged area using the [Insert] key

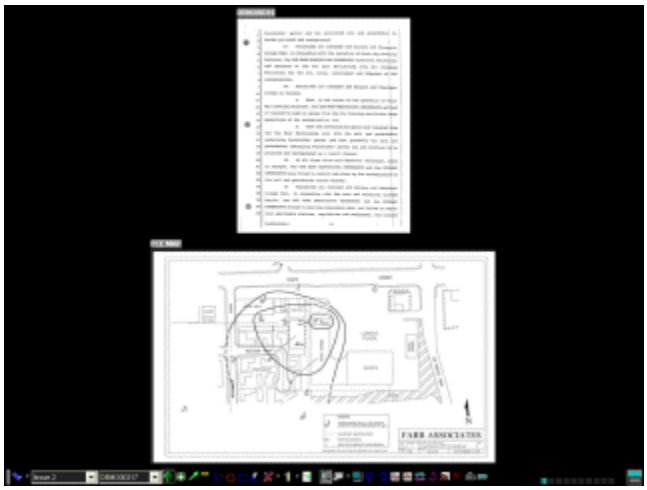
Right-click and drag to pan within the zoom window or use the **[Up], [Down, [Right],** and **[Left]** arrow keys.

Once an image has been enlarged, it can be reduced by pressing the **[delete]** key. Double-click on the image or press **[home]** to restore it to the full size of the zone.

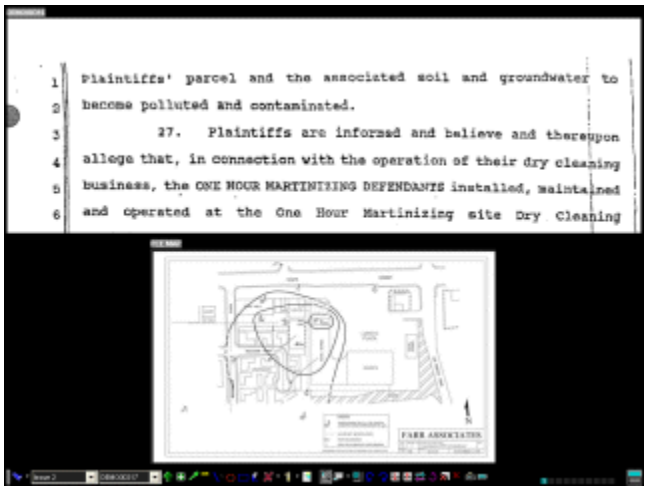
Zoom to Top

If an image has been resized to fit into the zone it is being displayed in, you can use the Zoom to Top (**-ZT**) command to enlarge the image as much as possible within the zone relative to the top of the image.

For example, if you wanted to compare a portrait document with a landscape image, you might load the items into zones 3 and 4, as shown in the figure below.



To enlarge the document as much as possible within the zone relative to the top, make zone 3 active by pressing **[F3]** and then type **-ZT** followed by the **[Enter]** key or scan the Zoom to Top barcode to zoom to the top.


Plaintiffs' parcel and the associated soil and groundwater to become polluted and contaminated.
27. Plaintiffs are informed and believe and thereupon allege that, in connection with the operation of their dry cleaning business, the ONE HOUR MARTINIZING DEFENDANTS installed, maintained and operated at the One Hour Martinizing site Dry Cleaning

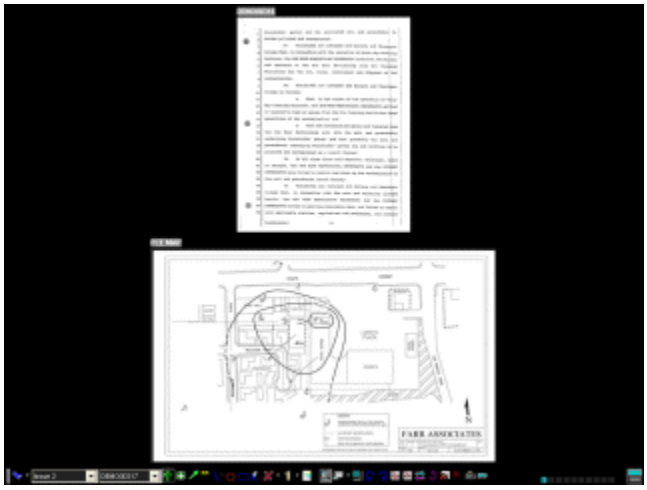
Right-click and drag to pan within the zoom window or use the **[Up], [Down, [Right],** and **[Left]** arrow keys

Double-click on the image or press **[home]** to restore it to the full size of the zone.

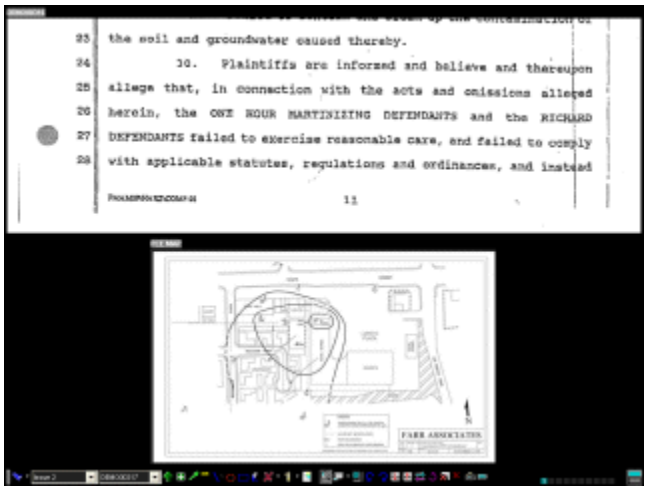
Zoom to Bottom

If an image has been resized to fit into the zone it is being displayed in, you can use the Zoom to Bottom (**-ZB**) command to enlarge the image as much as possible within the zone relative to the bottom of the item.

For example, if you wanted to compare a portrait document with a landscape image, you might load the items into zones 3 and 4, as shown in the figure below.



To enlarge the document as much as possible within the zone relative to the bottom, make zone 3 active by pressing **[F3]** and then type **-ZB** followed by the **[Enter]** key or scan the Zoom to Bottom barcode to zoom to the bottom.


the soil and groundwater caused thereby.
30. Plaintiffs are informed and believe and thereupon allege that, in connection with the acts and omissions alleged herein, the ONE HOUR MARTINIZING DEFENDANTS and the RICHARD DEFENDANTS failed to exercise reasonable care, and failed to comply with applicable statutes, regulations and ordinances, and instead
11

Right-click and drag to pan within the zoom window or use the **[Up], [Down, [Right],** and **[Left]** arrow keys.

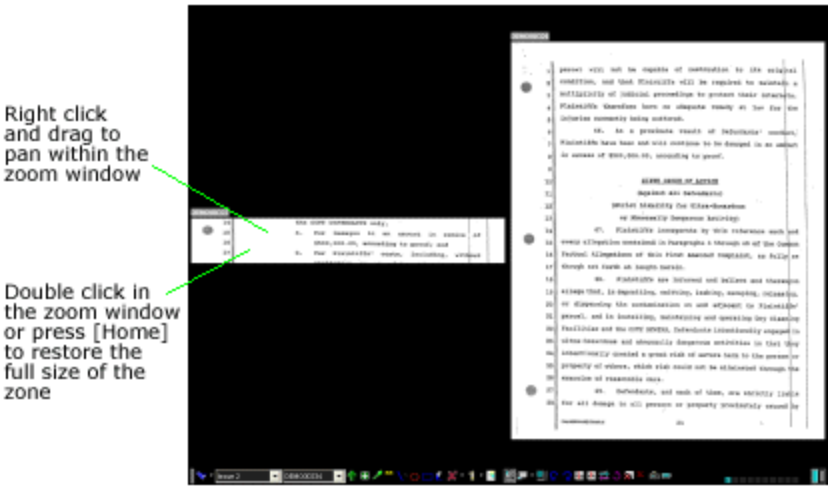
Double-click on the image or press **[home]** to restore it to the full size of the zone.

Rubber-band Zoom

By default, the cursor, or pointer, is the Zoom tool. The Rubber-band Zoom Mode is the default zoom when you enter TrialDirector unless you have selected the Fill Zone Zoom Mode as the default zoom in the Presentation Options.

To use the Rubber-band zoom, position the cursor in one of the corners of the desired area, using either a mouse or light pen, and click and drag to draw a box around the area you want to enlarge. When you release the mouse or light pen button, the area inside the zoom rectangle is enlarged and centered in the zone, as shown in the figure below.

Note: *If you have set the Fill Zone Zoom Mode as the default zoom, you will have to de-select the Fill Zone Zoom Mode button before you will be able to use the Rubber-band zoom.*

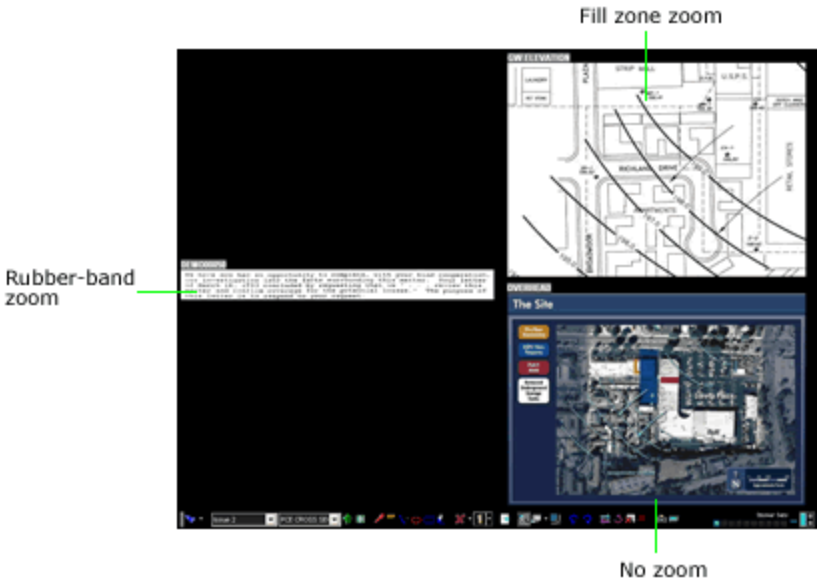

Right click and drag to pan within the zoom window
Double click in the zoom window or press [Home] to restore the full size of the zone

Double-click on the zoom window or press [home] to restore the image to the full size of the zone.

Fill Zone Zoom

The Fill Zone zoom is an aspect ratio zoom, which creates a zoom window that is the exact size and shape of the current zone. To use the Fill Zone zoom, select the Fill Zone Zoom tool by clicking the Fill Zone Zoom button. Position the cursor in one of the corners of the desired area using either a mouse or light pen, and click and drag to draw a box around the area you want to enlarge. When you release the mouse or light pen button, the area inside the zoom rectangle is enlarged to fit the entire zone.

For example, in the figure below, items were loaded into zones 1, 6 and 8. Notice that the Fill Zone zoom in zone 6 takes up the entire zone, while the Rubber-band zoom in zone 1 is centered in the shape selected by the user, independent of the zone size and shape.



Right-click and drag to pan within the zoom window or use the **[Up], [Down, [Right],** and **[Left]** arrow keys.

Double-click on the zoom window or press **[home]** to restore the image to the full size of the zone.

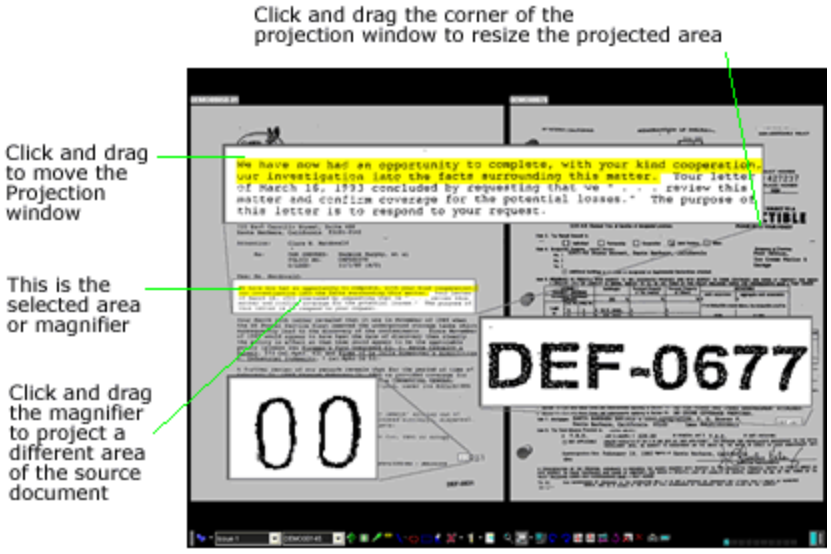
Area Projection Zoom

Topics:

- Area Projection Options
- Hide Projection Options
- Animate Projection Zoom

To project an area of an image, open the Presentation Toolbar and select the Area Projection tool. Using either a mouse or light pen, click and drag to draw a box around the area you want to project. When you release the mouse or light pen button, the projection appears with lines indicating the position of the projected area in relation to the original item, as shown in the figure below.

A maximum of ten (10) projections can be used simultaneously, but the Area Projection tool must be selected again before a new projection can be drawn.


Click and drag the corner of the projection window to resize the projected area
Click and drag to move the Projection window
This is the selected area or magnifier
Click and drag the magnifier to project a different area of the source document
DEF-0677
00

You can resize the projected area by placing the cursor on any edge of the projection window. When the cursor changes to a double-sided arrow, click and drag the side to enlarge or reduce the window.

Click anywhere in the projection window and drag to move it to a new location.

Click and drag the magnifier to pan around the source exhibit. The projection window automatically updates to magnify the new area.

Close the projection window using one of the following methods:

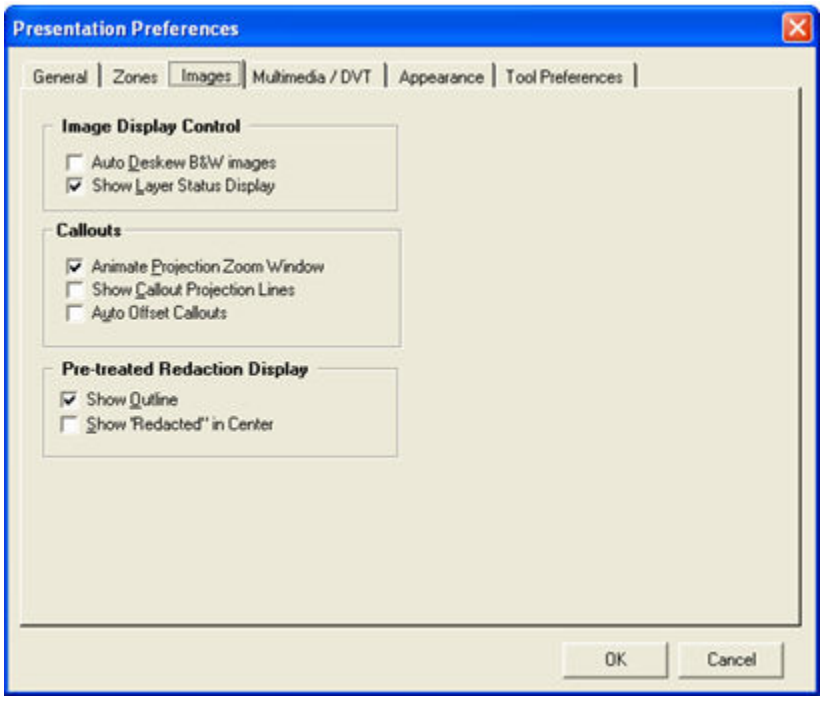
- Double-click on the dimmed background of the item to close all projections associated with that item.

OR

- Right-click on a specific projection window to close one particular projection. Note: Any changes made to the source document (annotations, enlargements, etc.) will automatically remove the projections.

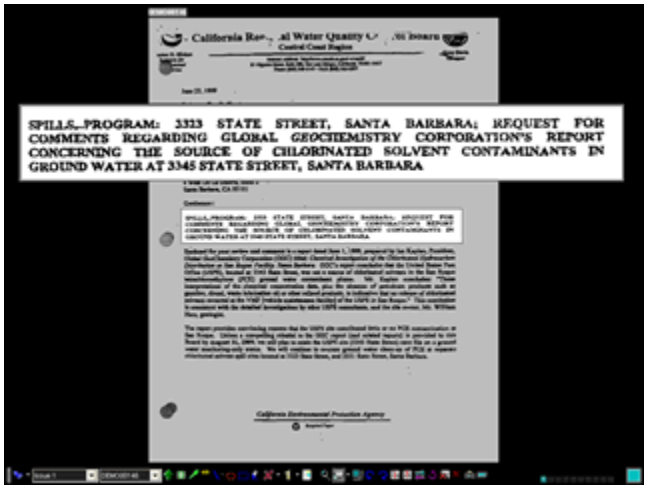
Area Projection Options

To change the Area Projection options, select **Presentation Options** from the View menu. Then choose the Images tab, as shown in the figure below.



Hide the Projection Lines

To hide the projection lines, un-check the **Show Callout Projection Lines** option and click **[OK]**. When you use the Area Projection tool, projection lines will not appear, as shown in the figure below.


SPILLS PROGRAM: 3333 STATE STREET, SANTA BARBARA; REQUEST FOR COMMENTS REGARDING GLOBAL GEOCHEMISTRY CORPORATION'S REPORT CONCERNING THE SOURCE OF CHLORINATED SOLVENT CONTAMINANTS IN GROUND WATER AT 3345 STATE STREET, SANTA BARBARA

Animate Projection Zoom

To animate projection zoom, check the **Animate Projection Zoom** option and click **[OK]**. When you use the Area Projection tool, the projected area will gradually enlarge to full size, as shown in the figure below.

When you close the projection, it will gradually retract in the same way.

Pan an Enlarged Item

When an item has been enlarged, you can pan the item within the zoom window by right-clicking on the zoomed item and holding the mouse button down while moving the mouse. You can also press the **[Up], [Down, [Right],** and **[Left]** arrow keys to pan the item in the active zone. If your light pen does not have a secondary button, use **Right-Mouse Button Mode** to right-click on an item.

More Information:

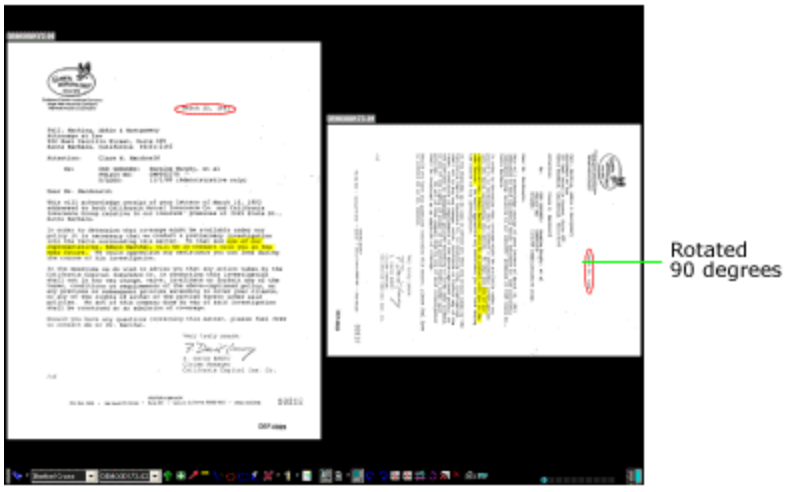
- Control the Presentation Display
- Presentation Toolbar

Rotate Images

To rotate the image in the active zone, open the Presentation Toolbar and do one of the following:

- Click the **[Rotate Left]** button to rotate the image 90 degrees counter-clockwise.
- Click the **[Rotate Right]** button to rotate the image rotates 90 degrees clockwise.

In the example below, the image in zone 2 is rotated 90 degrees clockwise.



Note: *Rotating an image will also restore it to the full size of the zone if it has been enlarged.*

More Information:

- Control the Presentation Display
- Presentation Toolbar

Presentation Mode Annotations

Topics:

- Draw an Arrow
- Highlight an Image
- Draw a Line
- Draw an Ellipse
- Draw a Rectangle
- Draw a Freehand Line
- Draw a Text Box
- Change the Annotation Color

The annotation tools on the Presentation Toolbar can be used to highlight and draw arrows, circles, and rectangles on images. Annotations can only be added to the item in the active zone. The Annotation tool buttons will reflect and save color choices made between sessions

Note: *Images can be annotated in TrialDirector prior to trial presentation (see Annotations).*

Draw an Arrow

To draw an arrow pointing to an important point on an item, open the Presentation Toolbar and select the Arrow tool. Position the cursor, using either a mouse or light pen, where you want the point or head of the arrow to appear. Drag the cursor away from the head in any direction to the length you want the line of the arrow to be.

Highlight an Image

To highlight an important point on an item, open the Presentation Toolbar and select the Highlight tool. Using either a mouse or light pen, click and drag the cursor in a rectangle around the area you want to highlight.

Draw a Line

To underline an important point on an item, open the Presentation Toolbar and select the Line tool. Using either a mouse or light pen, click and drag the cursor below what you want to underline.

Draw an Ellipse

To circle or place an ellipse around an important point on an item, open the Presentation Toolbar and select the Ellipse tool. Using either a mouse or light pen, click and drag the cursor to draw an ellipse around the area.

Draw a Rectangle

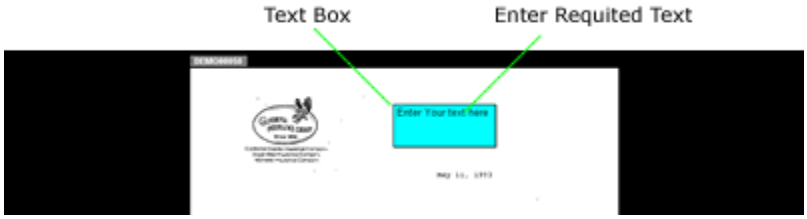
To place a rectangle or box around an important point on an item, open the Presentation Toolbar and select the Rectangle tool. Position the cursor, using either a mouse or light pen, and drag the cursor to draw a box around the area.

Draw a Freehand Line

To draw a freehand line on an item, open the Presentation Toolbar and select the Freehand tool. Using either a mouse or light pen, click and drag the cursor to draw the line.

Text Tool

To draw Text on an item, open the Presentation Toolbar and select the Text tool. Using either a mouse or light pen, click and drag the cursor to draw the text. Once the Text box has been created, text can be entered into it.



Change the Annotation Color

1. To change the default annotation color, open the Presentation Toolbar and right-click on the annotation tool you want to change.

   A color palette will appear above the tool, as shown in the figure below.

2. Select the desired color. Click in the black area to the left of the color palette to close it without changing the color.

Note: *You will not be able to clear the presentation display when the color palette is open.*

The annotation tool will show the new color, as shown in the figure below.

More Information:

- Presentation Mode
- Control the Presentation Display
- Presentation Toolbar

Applying Stamps

Topics:

- Overview
- Applying Stamps to an Exhibit
- Repositioning Stamps
- Removing Stamps

Overview

The Stamp tool allows you to place stamp marks onto the exhibit in Presentation mode. There are four stamp marks available to you.

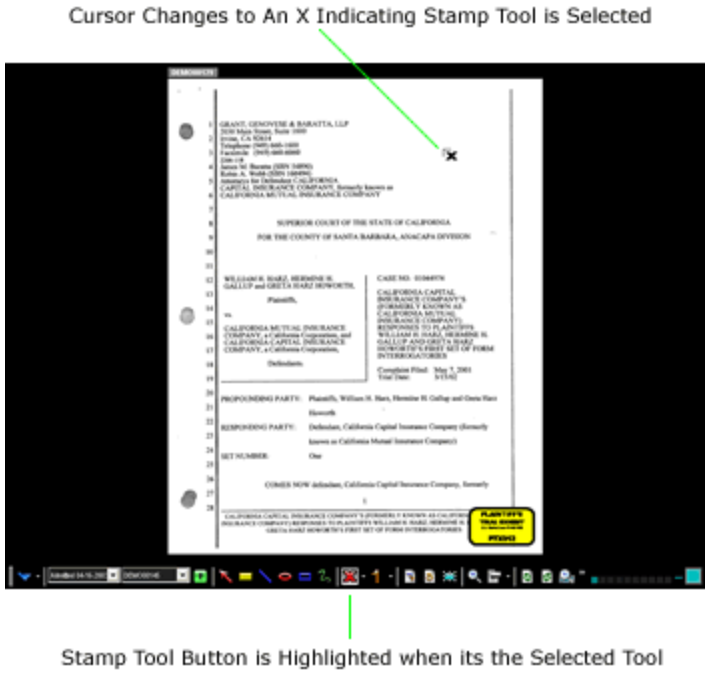
By clicking the down arrow on the right side of the stamps tool, the selection box shown above is made available.

Note: *Stamps applied in Presentation mode are not saved when the exhibit is closed.*

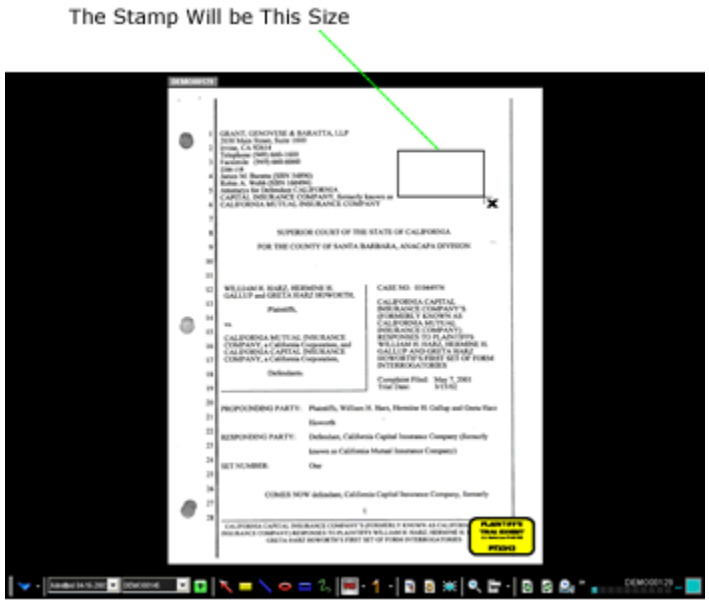
Applying Stamps to an Exhibit

1. Click the **[Stamp]** button on the presentation toolbar.

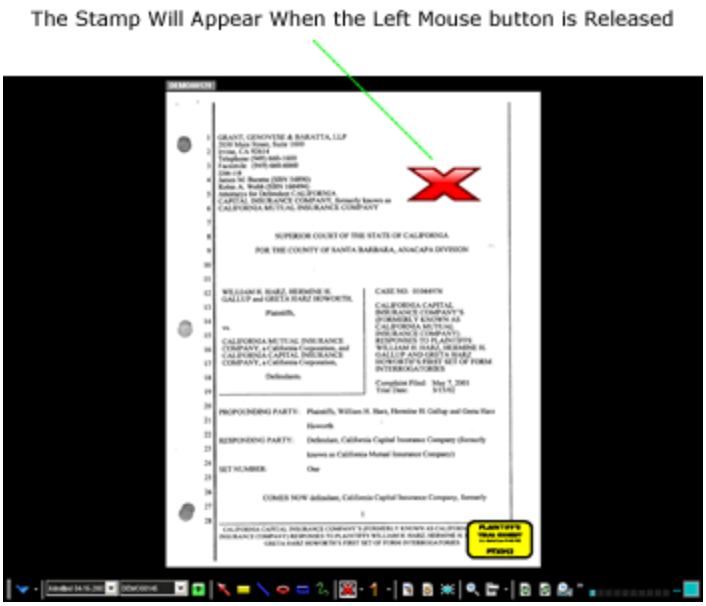
2. You can change the stamp by right-clicking on it and select one of the four choices available.
3. Move the pointer to the point of the exhibit to where you wish to apply the stamp.



4. Hold the left mouse button down and drag to create a white square/rectangle to the size of the stamp that you wish to apply.



5. Once you have created the desired size of the stamp, release the mouse button.
6. The stamp will be created inside the rectangle that was drawn



Reposition Stamps

Hold the **[Shift]** key down, left click on the stamp and then drag to reposition it

Removing Stamps

Hold the **[Shift]** key down, right click on the stamp to remove it.

More Information:

- Presentation Mode
- Control the Presentation Display
- Presentation Toolbar

Applying Stickers

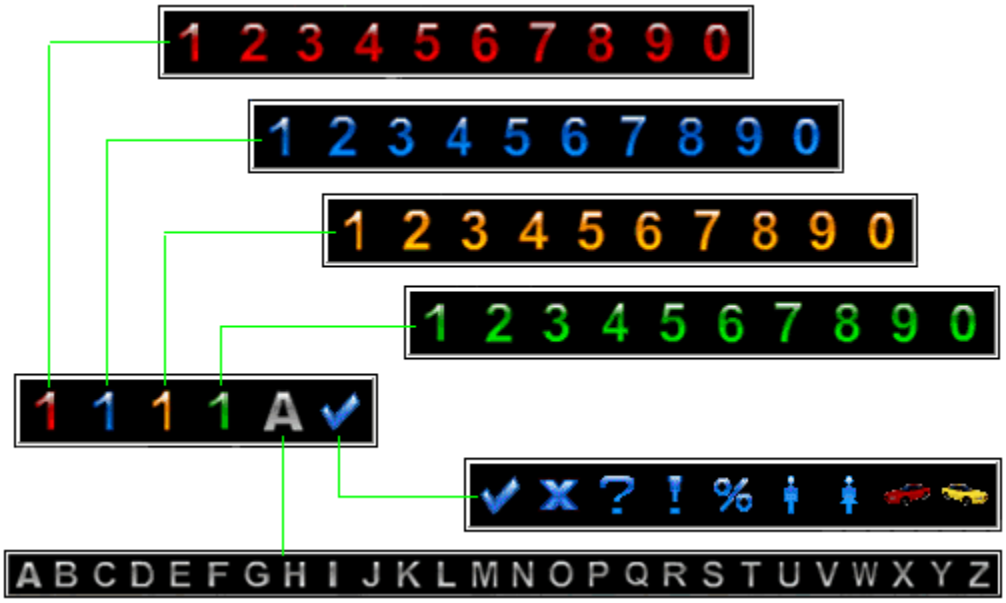
Topics:

- Overview
- Applying Stamps to an Exhibit
- Repositioning Stamps
- Removing Stamps

Overview

The sticker tool allows you to place identifying numbers, letters, or symbols onto an exhibit during presentation. There are five sets of stickers available to you. By clicking the down arrow on the right side of the sticker tool, the selection box shown below appears.

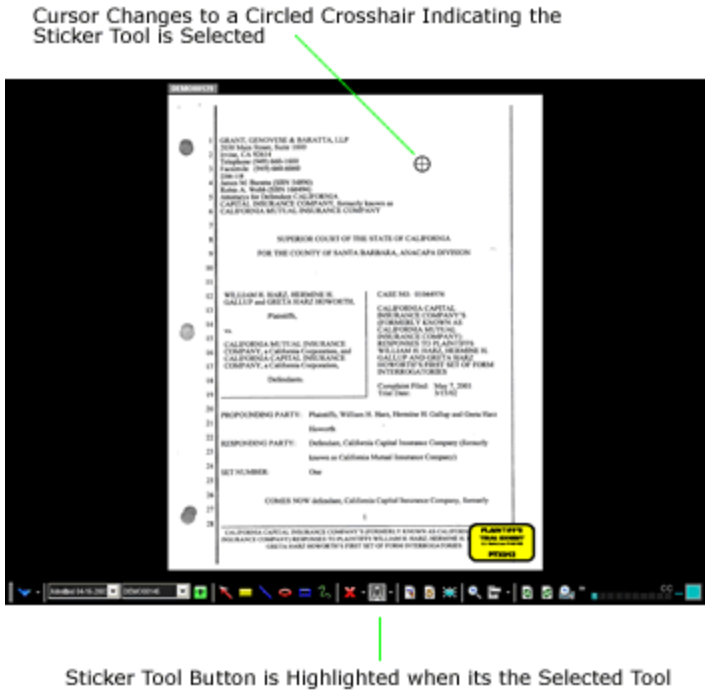
Right clicking on one of these will bring up a further selection box. This box allows you to choose which number/letter to start from when applying your stickers. The diagram below shows all of the selection boxes.



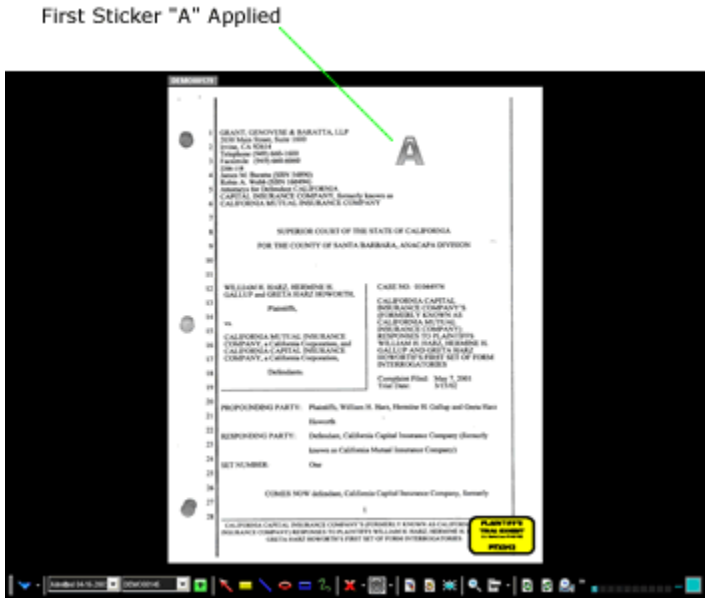
Note: *The stickers are not saved when the exhibit is closed.*

Applying Stickers to an Exhibit

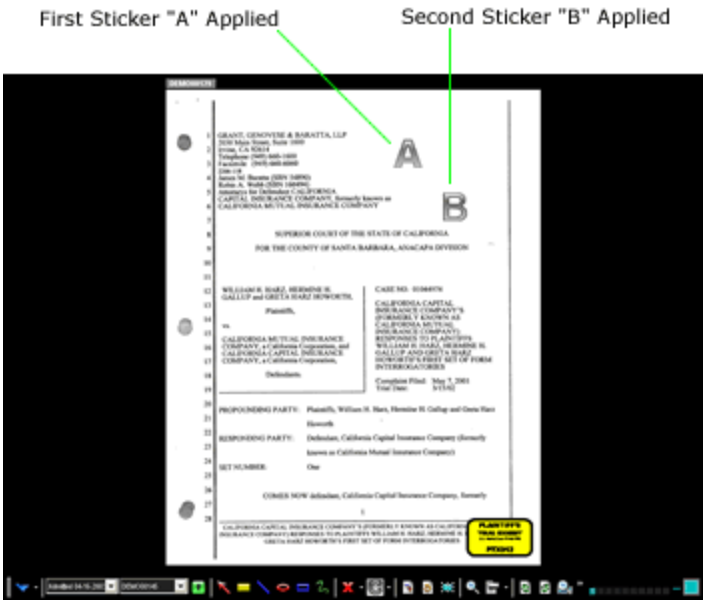
1. Click the **[Sticker]** button on the presentation toolbar
2. You can change the stamp by right-clicking on it and select one of the six choices available and from which number/letter to start from.
3. Move the cursor to the point of the exhibit to where you wish to apply the stamp.


Cursor Changes to a Circled Crosshair Indicating the Sticker Tool is Selected
Sticker Tool Button is Highlighted when its the Selected Tool

4. Click the left mouse button and the sticker will be applied to the exhibit. You can click and drag to create a stamp of a larger size, or just click to accept the default size.



5. After you have applied the first sticker, the next sticker that you apply will be next in numerical or alphabetical order, depending on the style of sticker that is currently selected. (The symbol stamps do not increment. The stamp you select - for example, the check mark - will just repeat.)



Repositioning Stamps

Hold the **[Shift]** key down, left click on the stamp and then drag to reposition it

Removing Stamps

Hold the **[Shift]** key down, right click on the stamp to remove it.

More Information:

- Control the Presentation Display
- Presentation Toolbar

Remove Markups

The Remover tool allows you to remove any markups applied in the Presentation Module.

1. To remove a markup, open the Presentation Toolbar and select the **Remover** tool .

   The cursor changes into an X.

2. Position the cursor, using either a mouse or light pen, on the markup you want to remove and click.

Note: *The Remover tool remains active until you clear it.*

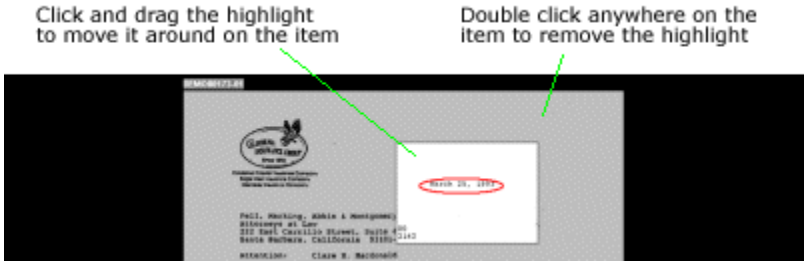
More Information:

- Control the Presentation Display
- Presentation Toolbar

Moveable Highlighter

To highlight a specific area of an item, open the Presentation Toolbar and select the Moveable Highlight tool from the Callout Zoom tools. Using a mouse or light pen, click and drag to draw a box around the area you want to highlight. When you release the mouse or light pen button, the area in the box is highlighted and the rest of the document is dimmed.

For example, you may want to highlight an area of the document as you review it so the jury can easily follow along.



Click and drag the highlight to move it around on the item.

Double-click the item to remove the highlight.

Note: *Make sure you are in the Rubber-band zoom mode when you are using the Moveable Highlight so that the selected area is not forced into the shape of the zone.*

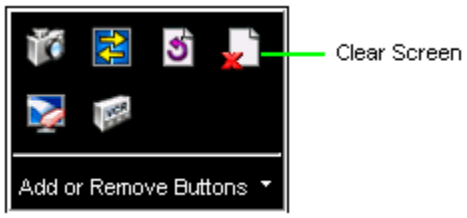
More Information:

- Control the Presentation Display
- Presentation Toolbar

Clear the Presentation Display

To clear all items on the Presentation display,

- Press **[Esc]** or open the Presentation Toolbar and click the Clear Screen button.



More Information:

- Control the Presentation Display
- Presentation Toolbar

Close Items

Do one of the following to close an item:

- Open the Presentation Toolbar and select the Remover tool . The pointer changes into an X. Position the cursor in the upper left corner of the item and click. This method does not work for OLE files.
- If you have Zone Headers enabled, position your cursor in the upper-right corner of the item. When the Zone Header Controls appear, click the **[X]**.
- Enter the appropriate close zone command. For example, to close an item in zone 1, enter **–X1** and press **[Enter]**.

When only one item remains, TrialDirector automatically resizes the item to fit in zone 9 if the Last Zone Auto Reposition option is selected in the Presentation Options.

More Information:

- Control the Presentation Display
- Presentation Toolbar

Commands and Keyboard Shortcuts

Topics:

- Zone Controls
- Main Controls
- Annotation Tool Controls

The following are the keyboard commands that can be used in the TrialDirector Presentation mode.

Zone Controls

The Zone Controls table provides you with a list of possible commands to use while in the TrialDirector Presentation Module. Each shows the description and the keyboard command necessary to implement the command.

Command	Keys	Description
-Z1	**[F1]**	**Zone 1** - vertical split, left side of display.
-Z2	**[F2]**	**Zone 2** - vertical split, right side of display.
-Z3	**[F3]**	**Zone 3** - horizontal split, top of display.
-Z4	**[F4]**	**Zone 4** - horizontal split, bottom of display.
-Z5	**[F5]**	**Zone 5** - quadrant split, upper-left corner of display.
-Z6	**[F6]**	**Zone 6** - quadrant split, upper-right side of display.
-Z7	**[F7]**	**Zone 7** - quadrant split, lower-left corner of display.
-Z8	**[F8]**	**Zone 8** - quadrant split, lower-right corner of display
-Z9	**[F9]**	**Zone 9** - Full Display
-TZ	**[F10]**	**Transfer Zone Mode** - allows you to transfer an item from one zone to another.
-AZ	**[F11]**	**Add Zone Mode** - allows you to add items into specified zones, moving items previously displayed into other zones or off the screen. It remains active until another zone command is used. Disables Replace Zone Mode.
-RZ	**[F12]**	**Replace Zone Mode** - allows you to replace an item in one zone with another item, leaving all other items in other zones in place

Main Controls

The Main Controls table provides you with an alphabetized list of possible commands to use while in the TrialDirector Presentation mode. Each shows the description and the keyboard command necessary to implement the command.

Command	Keys	Description
-AD or **-AE**	**Alt + Insert**	**Admit Exhibit** - admits the current exhibit to the Admitted workbook. An Admitted workbook is created based on the current date (i.e. *Admitted 04-10-2003*)
None	**Alt + End**	Prompt user to Exit TrialDirector
-BU	**None**	**Back Up** - Allows you to back up the presentation one command at a time up to thirty (30) commands, including those issued using a script (excluding Back Up commands)
None	**Alt + B**	**Blank (Hide) -** Hides the contents of the presentation screen
None	**Alt + 1,2,3 or 4**	**Change Multimedia Playback Speed -** Adjust the play back speed from Super Slow to 2x speed.
-CL or **-CS**	**Escape** or **ALT + F12**	**Clear Screen** - allows you to clear the Presentation display. ***Note:*** *Using the –CL command on a clear Presentation display will prompt to exit TrialDirector.*
-CZ	**End**	**Close Zone** - allows you to close the item in the active zone.
-X + zone no. (e.g., -X1)	**None**	**Close Specific Zone** - allows you to close the item in a specific zone.
-CC	**Shift + F11**	**Closed Captioning** - allows you to enable or disable closed captioning.
None	**Alt + S**	**Create Snapshot**
None	**-RF + (Record#)**	**Display Case Record Command -** Jump to and display a specific database case database item
None	**Alt + F**	**Display Full sized Image when zoomed in**
-DD	**Alt + Page Down**	**Display Next Case Database Document -** Move to first page of next document
-DU	**Alt + Page Up**	**Display Previous Case Database**

		Document - Move to first page of previous document
None	**-RN** or **Alt+<**	**Display Previous Case Record Command -** Move to next record number
None	**-RN** or **Alt+>**	**Display Next Case Record Command -** Move to previous record number
-DK	**None**	**Deskew Image On/Off** – Used to toggle the auto image Deskew option on or off.
	Alt + Z	**Enable Rubber band Zooms**
-EX or **-EXIT**	**Escape**	**Exit** - allows you to exit Presentation Mode. ***Note:*** *Using the ESC key to exit Presentation mode will prompt for confirmation. The –EX and –EXIT commands will exit without confirmation.*
-ZE	**Shift + Insert**	**Expand Active Zone** - allows you to enlarge the item in the active zone to fit the entire screen without clearing items in other zones.
-FA	**None**	**Fade Video On/Off**
-FT	**None**	**Find Text** - searches for the value entered after this command in the transcript text of the current clip.
-PG001	**Shift + Home**	**First Page** - allows you to jump to the first page of a document.
-PG	**Alt + G**	**Goto Page** - allows you to go to a specific page by typing -PG followed by the page number (i.e., -PG051).
-GW	**Shift + F5**	**Grab Window** - allows you to grab the active zone with all markups and create a new item, which will appear on the Photo tab in Document Manager. This item can be recalled during the presentation.
-PG999	**Shift + End**	**Last Page** - allows you to jump to the last page of a document.
-PT	**Shift + Backspace**	**Mouse Pointer Toggle** - allows you to toggle between showing and hiding the mouse pointer.
-VS0	**Control + F7**	**Multimedia Speed 0** - allows you to pause the multimedia in the active zone.
-VS1	**Control + F8**	**Multimedia Speed 1** - allows you to play the multimedia in the active zone in super

		slow motion.
-VS2	**Control + F9**	**Multimedia Speed 2** - allows you to play the multimedia in the active zone in slow motion.
-VS3	**Control + F10**	**Multimedia Speed 3** - allows you to play the multimedia in the active zone at normal speed.
-VS4	**Control + F11**	**Multimedia Speed 4** - allows you to play the multimedia in the active zone at twice normal speed.
-NF	**Control + Down Arrow**	**Next Workbook** - loads the next workbook in the workbook list.
-NI	**Control + Right Arrow**	**Next Item** - loads the next item in a workbook.
-NO	**Control + Page Down**	**Next Overlay** - allows you to move to the next overlay when multiple layers of annotations have been used on an item.
-NR	**Control + Page Down**	**Next Revision** - allows you to quickly move to the next revision of an item.
-DVT0	**Shift + F7**	**No Override** - disables override of the option set in the DISPLAY OPTION Case Explorer field in Document Manager.
-OC	**None**	**Open Case** – Displays the *Open a Case* dialog within Presentation mode.
-PU	**Page Up**	**Page Up** - allows you to page up in a multiple page item.
-PD	**Page Down**	**Page Down** - allows you to page down in a multiple page item.
-PZ	*** (on 10-key pad)**	**Pause Multimedia** - allows you to pause multimedia that is currently playing in the Multimedia Viewer.
-PY or **-PL**	**/ (on 10-key pad)**	**Play Multimedia** - allows you to play multimedia that is currently paused in the Multimedia Viewer.
None	**Shift + Function Key (1-4)**	**Play Macro** - allows you to recall the key strokes that were saved as a macro.
-PS	**Alt + Home**	**Presentation Preferences** – Displays the Presentation Preferences dialog within TrialDirector.
-PF	**Control + Page Up**	**Previous Workbook** - loads the previous workbook in the workbooks list.
-PI	**Control + Left Arrow**	**Previous Item** - loads the previous item in a workbook.

-PO	**Control + Page Up**	**Previous Overlay** - allows you to move to the previous overlay when multiple layers of annotations have been used on an item.
-PR	**Shift + Page Up**	**Previous Revision** - allows you to quickly move to the previous revision of an item.
None	**Control + Function Key (1-4)**	**Record Macro** - allows you to save the key strokes displayed in the lower-right corner of the screen as a macro.
-RE	**None**	**Remark Event Log** - allows user to add textual remark to Event Log. Type command then the remark you wish to add to the Event Log.
-ZR	**Shift + Delete**	**Retract Active Zone** - allows you to retract an expanded zone back to its regular size.
None	**Alt + R**	**Rewind Active Video Zone to Beginning**
-RL	**Shift + Left Arrow**	**Rotate Left** - allows you to rotate an item 90 degrees to the left.
-RR	**Shift + Right Arrow**	**Rotate Right** - allows you to rotate an item 90 degrees to the right.
-SI	**None**	**Script Item** – New option for TrialDirector v4.0. Use this command to jump to a specified item within a script. For example, type –SI9, then to jump to the 9th item within the script. If there are zone commands that occur prior to the script item, those commands will be executed. It is recommended to pause the script prior to using this command. If spaces occur between items within the script file, a <spacebar> keystroke is required to initiate the –SI command.
-SV	**None**	**Save Current PowerPoint Slide Settings** – Used when running the TrialDirector PowerPoint plug-in. Saves the TrialDirector zone item arrangement for the current PowerPoint slide. This arrangement will be recalled when running the PowerPoint slideshow in the future.
-SP	**None**	**Script Pause** - Pauses the script when it is set for automatic advancement.
-SD	**Down Arrow**	**Scroll Down** - allows you to move a zoomed item down in the zoom window. You can use the Down Arrow key instead of typing the command
-SL	**Left Arrow**	**Scroll Left** - allows you to move a zoomed item to the left in the zoom window. You can use the Left Arrow key instead of typing the

		command.
-SR	**Right Arrow**	**Scroll Right** - allows you to move a zoomed item to the right in the zoom window. You can use the Right Arrow key instead of typing the command
-SU	**Up Arrow**	**Scroll Up** - allows you to move a zoomed item up In the zoom window. You can use the Up Arrow key instead of typing the command.
None	**Alt + I**	**Select the Last Callout Projection Style Used -** Will enable last callout projection tool
-SG	**SHIFT+F12**	**Segment Advance** – Advances to next or specified DVT Clip Segment. Using –SG only will advance to the next segment. Using –SG with a number (i.e. –SG5) will advance to that specified DVT clip segment
None	**CTRL+SHIFT+F12**	**Segment Indicator On/Off** – Toggles the current DVT Clip segment indicator in the upper right-hand corner of the video window. ***Note:*** *This command is currently designed to toggle the indicator for the current Presentation session only. The indicator status is not saved upon exiting TrialDirector.*
-PA	**None**	**Set Party** - sets the value for the ADMIT BY field of an admitted exhibit
-WT	**None**	**Set Witness** - sets the value for the WITNESS field of an admitted exhibit.
-SC	**None**	**Show Color Palette** – displays the annotation tool color palette in TrialDirector. The color palette is displayed at the current cursor location.
-SH	**None**	**Show/Hide Markups** - shows or hides the annotations on the Presentation Display
-SS	**Spacebar**	**Step Script** - allows you to move to the next item in the script.
-TM	**None**	**Tandem Mode** - sets Tandem Exhibit Presentation Mode.
-DVT2	**Shift + F9**	**Text Only** - presents the transcript text only for DVT clips.
None	**Alt + P**	**Toggle Play/Pause of Multimedia**
None	**Alt + T**	**Toggle the Presentation Toolbar On/Off**

-TB	**ALT + Page Down**	**Top/Bottom Zoom** – Displays the bottom of the current image page and the top of the next page simultaneously. Use this command to view a paragraph that spans more than one image page. Use this command when the current image page resides in Zone 9.
-TO	**CTRL+ALT+ Page Down**	**Top Image Only** – Used in conjunction with the Top / Bottom Zoom command. Displays the top half of the bottom image after a Top / Bottom Zoom command has been initiated. This command is designed to focus attention back to the next image page. Use the Top / Bottom Zoom command (-TB) to continue browsing the remaining pages in the document in a similar fashion.
-VC	**Alt + V**	**VCR Display Toggle** - shows or hides the Multimedia Control Box
-DVT1	**Shift + F8**	**Video and Text** - presents all DVT clips with both video and text.
-DVT3	**Shift + F10**	**Video Only** - presents the deposition video only for DVT clips.
-ZI	**Insert**	**Zoom In** - allows you to enlarge an item relative to the center of the zone.
-ZO	**Delete**	**Zoom Out** - allows you to reduce an item relative to the center of the zone.
-ZB	**Shift + Down Arrow**	**Zoom to Bottom** - allows you to enlarge the item as much as possible within the zone relative to the bottom of the item.
-ZT	**Alt + W**	**Zoom to Top** - allows you to enlarge the item as much as possible within the zone relative to the top of the item.

Annotation Tool Controls

This table provides you with a list of keyboard shortcuts used to enable most of the annotations tools available within TrialDirector. Each item shows the keyboard command necessary to enable or disable the associated annotation tool.

Command	Key	Description
ALT + F1	**Alt + A**	**Arrow Tool** – Used to enable or disable the arrow annotation tool.
ALT + F2	**Alt + H**	**Highlight Tool** – Used to enable or disable the highlight annotation tool.

ALT + F3	**Alt + L**	**Line Tool** – Used to enable or disable the line annotation tool.
ALT + F4	**Alt + O**	**Ellipse Tool** – Used to enable or disable the ellipse annotation tool.
ALT + F5	**Alt + =**	**Rectangle Tool** – Used to enable or disable the rectangle annotation tool.
ALT + F6	**Alt + j**	**Freehand Draw Tool** – Used to enable or disable the freehand annotation tool.
None	**Alt + Y**	**Redaction Tool** - Used to enable to disable the redaction annotation tool.
None	**Alt + N**	**Text Tool** - Used to enable and disable the Text annotation tool
ALT + F7	**None**	**Stamps Tool** – Used to enable or disable the new stamps annotation tool.
ALT + F8	**None**	**Stickers Tool –** Used to enabled or disable the new stickers annotation tool.
ALT + F9	**None**	**Show/Hide Markups** – Used to toggle the show/hide markups button.
ALT + F10	**None**	**Default Zoom Tool** – Used to toggle between the Rubber band and area projection zoom tools.
	Alt + E	**Erase Annotations -** Erase all of the current image annotations.
	Shift + Right Mouse Click	**Erase selected Annotation -** Erases the current selected image annotation.
ALT + F11	**Alt + U**	**Undo Last Action** - Used to undo the last action. You can undo as many actions as necessary.
ALT +C+ #	**None**	Changes the default color of the selected annotation tool. For Example, "ALT + C + 3 [Enter]" will change the default color to green. Alternatively use the letters CMYKRBGAOPW.

More Information:

- Presentation Display
- Control the Presentation Display
- Presentation Toolbar

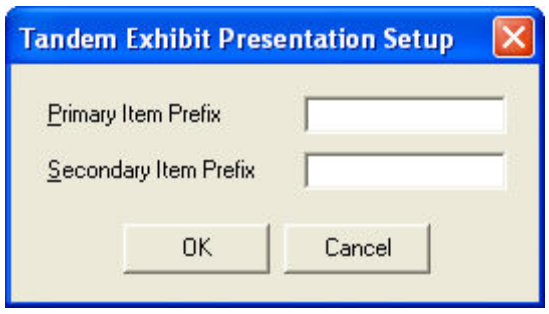
Tandem Exhibit Presentation

A tandem exhibit presentation is used when it is necessary to link and simultaneously display a series of complimentary exhibits, for example to show a series of before and after images, or to present exhibits in multiple languages.

1. To set up a tandem exhibit presentation, do one of the following:

- Select **Presentation Options...** from the View menu
- Hold down the **[Control]** + **[Home]** keys

2. Select the **Zones** tab.
3. In the General box, click the **Set** button next to **Configure tandem mode options**.

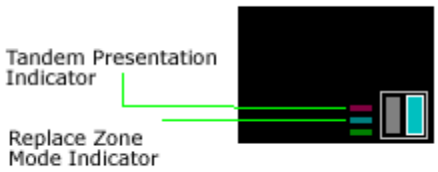


4. Enter a Primary (master) item prefix (e.g., EXH for exhibits EXH001, EXH002, etc.).
5. Enter the correlating Secondary (slave) item prefix (e.g., XYZ for exhibits XYZ001, XYZ002, etc.).

   For example, in a multiple language case, all exhibits in English might start with the prefix ENG, which would be entered as the master item prefix. All exhibits in a second language, such as Japanese, might start with the prefix JAP, which would be entered as the slave item prefix. In this scenario, loading ENG001 would also load JAP001. The only requirements are that both prefixes are the same length and the alphanumeric characters following the prefixes are identical (i.e., ENG001 would not load JAP0001).

6. Click **[OK]** to save the settings.
7. Open Presentation mode, if it is not already.
8. Type **[-TM]** then **[Enter]** to activate tandem exhibit presentation.

   The Replace Zone Mode Indicator and the Tandem Exhibit Presentation Indicator will appear in the lower right corner of the presentation display.



9. Load an item using either the master prefix or the slave prefix.

   The master exhibit will appear in zone 2 and the slave exhibit will appear in zone 1. If you zoom in on the exhibit in zone 1, the same area of the item in zone 2 will also be enlarged.

10. Continue loading items, as desired.

The presentation display will remain in Tandem Exhibit Presentation mode until you type **[-TM]** then **[Enter]** again.

More Information:

- Control the Presentation Display

Admit Trial Exhibits

Trial exhibits can be admitted instantly from the Presentation mode according to admitting party, witness, and trial exhibit number.

To admit an exhibit, first make sure the zone displaying the exhibit is active by pressing the corresponding function key.

The admitting party and witness can be set prior to admitting the exhibit, if desired, as described below.

- Type "**-PA"** followed by the name of the admitting party (e.g., defense) and then press the **[Enter]** key. This will automatically set the ADMIT BY field.
- Type "**-WT"** followed by the name of the current witness (e.g., jones, c) and then press the **[Enter]** key. This will automatically set the WITNESS field.

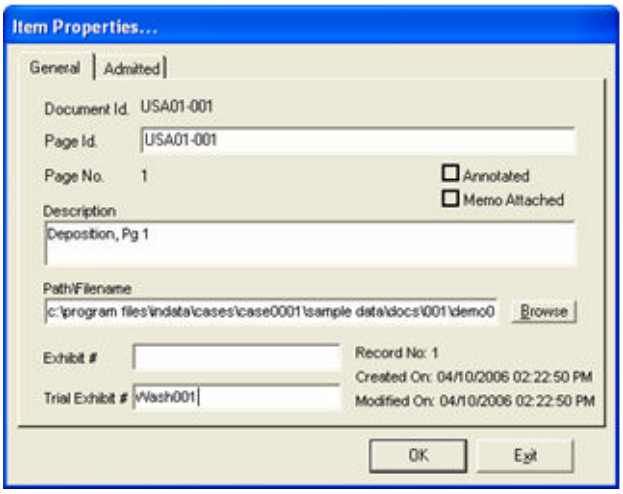
Note: *There will be no visual indication that the parameters have been set. After the exhibit is admitted, view the record for the exhibit in the Document Manager Case Explorer to determine whether or not the ADMIT BY and WITNESS fields were populated correctly.*

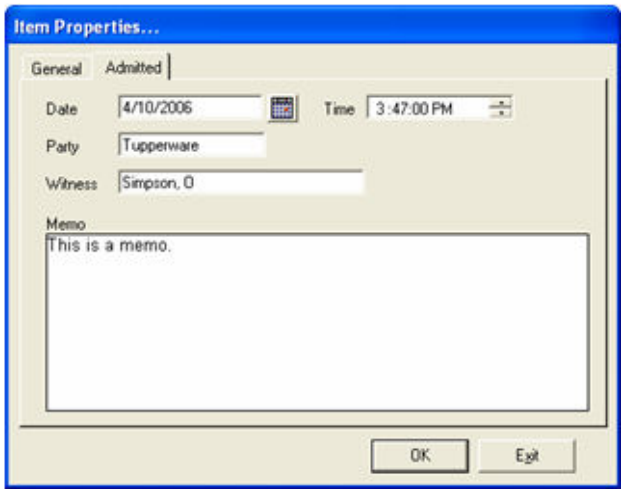
Type -AD followed by the Enter key to admit the exhibit.

To assign a Trial Exhibit Number to an item when you admit it, type **-AD(trial exhibit number)** followed by the **[Enter]** key (e.g., typing "-ADABC001" will admit the exhibit in the active zone as trial exhibit ABC001).

This will create a new workbook called ADMITTED and will insert the exhibit into this workbook. Each item will be date and time stamped.

To view the admitted exhibit properties, go to the Workbook Explorer of the Case Library tab, expand the Admitted workbook and right-click on the exhibit ID. Select Admitted Item Properties to display the item properties dialog. You can make any desired changes or notes in the fields of the General or Admitted tabs, then click OK to save and exit.





More Information:

- Presentation Mode
- Control the Presentation Display

Scripts

Scripts

TrialDirector allows you to list all of the commands you want to execute during trial in a script file and then call up the script in the Presentation Mode to begin stepping through the commands.

What do you want to do?

- Create a Script
- Save a Script
- Edit a Script
- Execute a Script

More Information:

- Control the Presentation Display
- Scripts

Create a Script

Topics:

- Export Workbook Contents to a Script File
- Create a Script File Using a Text Editor

Scripts can be created by exporting the contents of a workbook to a script file or by entering script commands in a text file editor

Export Workbook Contents to a Script File

The Document Manager allows you to create a script file from the contents of a workbook by right-clicking on the desired workbook and selecting **Send Workbook Contents To Presentation Script** from the shortcut menu (see Export Workbook Contents to a Script File). The script file is automatically saved in the Scripts folder within the current case folder (e.g., Case0000).

Create a Script File Using a Text File Editor

Open any text file editor (such as Microsoft Notepad) and list each command, in order, that you want TrialDirector to perform when you execute the script.

For example, if you want TrialDirector to load item DX000728-001 into zone 9 in add zone mode, you would list the following commands in the script file:

-AZ
-Z9
DX000728-001

A blank line in the script file indicates that you want TrialDirector to stop at that point and wait for you to enter the Step Script command (-ss or spacebar) before continuing.

For example, if you want to pause after loading DX000728-001 before transferring the exhibit into zone 1 and loading item GRAPHIC01 into zone 2, you would list the following commands in the script file:

-AZ
-Z9
DX000728-001

-Z9
-XR
-Z1
-Z2
GRAPHIC01

A semicolon at the end of the last line of a step of the script indicates that you want TrialDirector to step the script automatically after waiting for the number of seconds indicated after the semicolon.

For example, if you want TrialDirector to pause 5 seconds after loading DX000728-001 before executing the next command in the script, you would list the following commands in the script file:

-AZ
-Z9
DX000728-001;5
-Z9
-XR
-Z1
-Z2
GRAPHIC01

Any of the commands available in TrialDirector can be executed in a script (see Commands and Keyboard Shortcuts).

Before using a script in trial, make sure it presents items exactly as you had planned. When entering multiple commands, one minor mistake can cause the remaining commands to create undesired effects.

More Information:

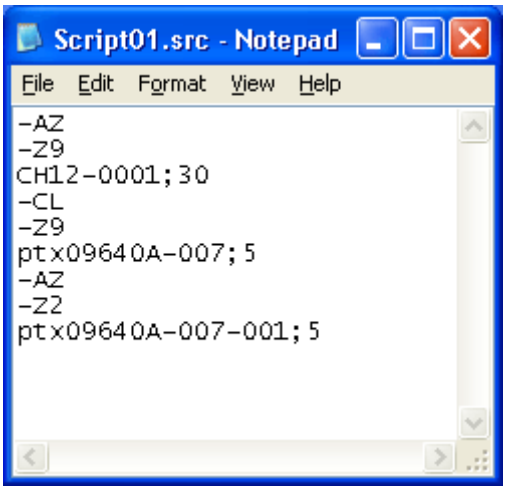
- Control the Presentation Display
- Scripts
- Edit a Script
- Execute a Script

Edit a Script

Edit a script file by selecting **Edit Presentation Script File** from the Tools menu on the Document Manager or Case Library tabs.

In the resulting navigation window, select the desired script and click **Open**.

The script file is opened in Windows Notepad, as shown in the figure below.



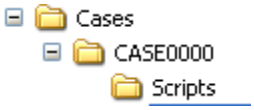
Make the desired changes and save the modified script file.

More Information:

- Control the Presentation Display
- Scripts

Save a Script

In order to execute a script in Presentation mode, you must save the script file in a folder named Scripts within the appropriate case directory (e.g. Case0000). You will need to create the Scripts folder manually if you plan to use scripts, as shown in the figure below.



Save the script file in the Scripts folder as a text only file with an *.scr extension.

For example, to save a script to be used with the Demonstration Case, create the script in a text editor and then save it as a text only file named Script01.scr in the Scripts folder within the Case0000 directory.

More Information:

- Control the Presentation Display
- Scripts

Execute a Script

After the script file has been created and saved in the appropriate case directory, you can execute the script by opening Presentation mode and typing the filename of the script (excluding the extension) followed by the **[Enter]** key.

For example, to execute a script that was saved as Script01.SCR, type Script01 and then press **[Enter]**.

To manually execute the next step of a script, enter the Step Script command (**–SS**) and press **[Enter]** or just press the **[Spacebar]**.

When TrialDirector reaches the end of a script, it will start the script over again.

You can interrupt the script at any time by manually entering commands. The script will pick up where it left off when you step the script or wait long enough for the pause time to expire in the script.

Note: *When you interrupt a script, remember that the script is going to pick up right where it left off. If you switch modes or rearrange a lot of items, the script may not move items around the screen the way you wanted it to.*

Press **[Esc]** to close a script.

More Information:

- Control the Presentation Display
- Scripts

Grab Commands (Screen Capture)

Topics:

- Grab a Screen
- Grab a Window (Zone)

The Grab Commands allow you to capture the entire Presentation display or a specific zone exactly as you see it on the screen and save it as a new item on the Document Manager Case Explorer. There are many uses for this:

- Save time during the courtroom presentation by setting up your screens prior to trial with annotations, rotations, enlargements, and projections and then saving the screens as new items for recall during trial.
- Save exhibits marked up during trial by a witness as new exhibits.
- Create slides for Microsoft PowerPoint presentations.

Barcodes can be created for the captured screens so that you can easily recall them during trial.

The Grab commands that allow you to save items while you are working in the Presentation Module are the Grab Screen (-GS) and the Grab Window (-GW) commands.

Grab a Screen

The Grab Screen (**-GS)** command allows you to load items, make annotations, and then save the screen as a new item. The new item can have a barcode associated with it for recall during trial.

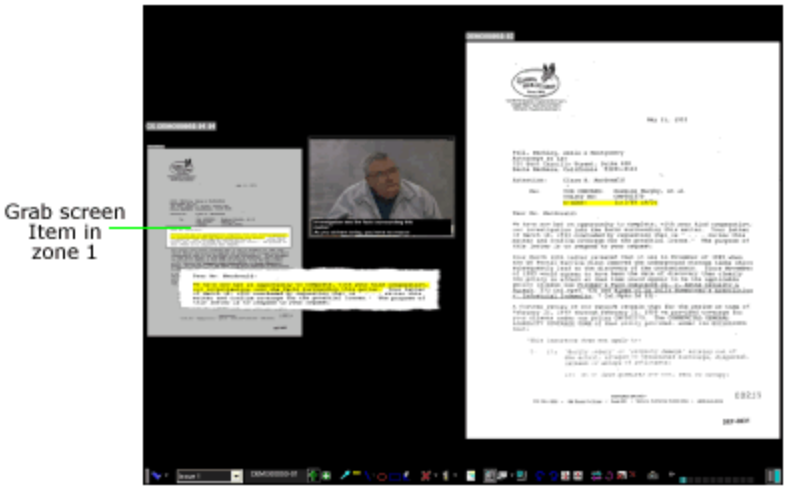
To use this powerful feature, load items into the desired zones in the Presentation Module. Annotate, rotate, and enlarge the items as desired. When the screen appears exactly as you would like, type or use a barcode wand for the following command:

-GS followed by the [Enter] key

TrialDirector automatically creates a new item in the Document Manager Case Explorer named GS-001 (the last numbers increment automatically each time a new grab screen occurs). Document Manager provides a default date and time stamped description for each captured screen. In Document Manager, you can change the description of the new item and print a barcode to be used during the trial.

When creating a new capture item, you can assign an Item ID to the new item by combining an Item ID (up to eight characters) with the command as follows:

-GS[filename] followed by the [Enter] key



Some predefined barcodes, which can be used in multiple cases, accompany TrialDirector for your convenience.

Grab a Window

The Grab Window (**-GW**) command allows you to load an item, make annotations, and then save the active zone as a new item. The new item can have a barcode associated with it for recall during the trial.

To use this powerful feature, load an image into the desired zone in the Presentation Module. Annotate, rotate, and enlarge the item as desired. When the item in the zone appears exactly as you would like, click on the item to activate the zone or press the appropriate function key and then type or use a barcode wand for the following command:

-GW followed by the [Enter] key

TrialDirector automatically creates a new Item ID in the Document Manager named [Item ID]-GW-001 (the last numbers increment automatically each time a new grab window occurs with the same item). Document Manager provides a default date and time stamped description for each captured screen. In Document Manager, you can change the description of the new item and print a barcode to be used during the trial.

You can assign an Item ID to the new item by combining the Item ID (up to eight characters) with the command as follows:

-GW[filename] followed by the [Enter] key

Some predefined barcodes, which can be used in multiple cases, accompany TrialDirector for your convenience.

Note: *Before you perform a grab window, make sure that your area projections do not exceed the boundaries of the zone because the Grab Window command will only capture the contents of the zone area.*

More Information:

- Presentation Display
- Control the Presentation Display
- Presentation Toolbar

Layer Status Indicator

The Layer Status Indicator uses a graphical interface to control annotation layers. This tool allows users to move to the next or previous layers with a single click of the mouse. Also, the Layer Status Indicator provides the ability to select multiple layers at once for display. Layers can even be selected out of order.

About the Layer Status Indicator

The Layer Status Indicator is enabled by default. It is displayed in the lower right-hand corner of the Presentation Display, next to the Zone Indicator, as shown below.

By default, layer #1 is displayed. The status indicator can display all 10 layers of an annotated image.

Note: *To disable the Layer Status Indicator clear the "Show Layer Status Display" option within the Images tab of the Presentation Options dialog.*

Select Next or Previous Layer

To select the next or previous layer, simply click the next or previous layer box, as shown below.

If the next layer box is clicked, the current image will display the next annotation layer. If the previous layer box is clicked, the current layer will be hidden from display.

Select Multiple Layers

Multiple layers can be selected at once using the Layer Status Indicator. Simply **right-click** on each annotation layer you would like to display (for example, layers #1, #3, #6, #8). Right-click again to hide any particular layer from view.

More Information:

- Create Layers
- Control the Presentation Display
- Presentation Toolbar

Save the Presentation Display

Although any markups or other changes you make to an item during a presentation are not permanent, TrialDirector allows you to save the active zone or the entire Presentation Display using the grab screen commands.

Note: *When you use the save commands, the window or screen will also be saved as a bitmap on the photo tab with an automatically assigned generic Item ID.*

More Information:

- Control the Presentation Display
- Presentation Toolbar

Show or Hide Markups

The Presentation mode displays all markups by default. To hide all markups on the image being displayed in the active zone (including those applied in Document Manager during pre-trial preparation),

1. Open the Presentation Toolbar and click the **Markup Show/Hide** button.
2. Click the button again to restore the markups.

Note: *Double-clicking or using any other tool on an item with hidden markups will automatically restore the markups.*

More Information:

- Control the Presentation Display
- Presentation Toolbar

Zoom Callouts

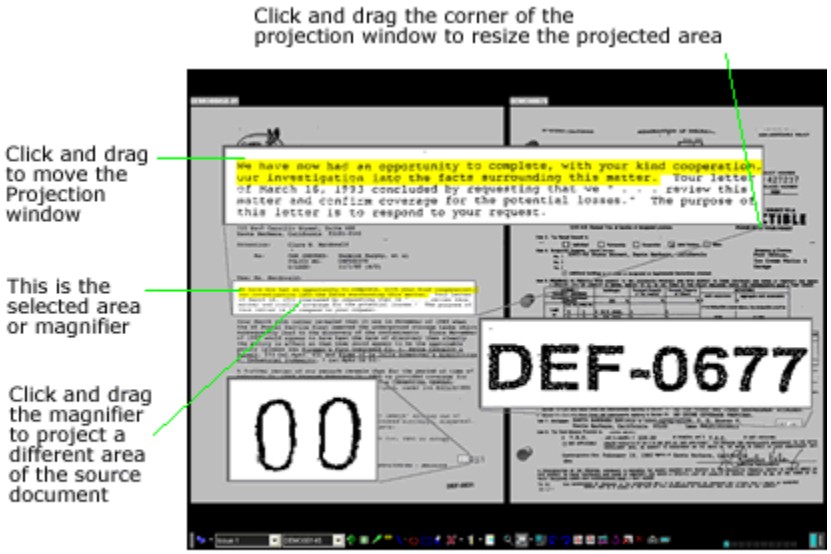
Topics:

- Overview of Projection Zoom Callouts
- Callout Styles Available
- Area Projection Options
- Hide Projection Options
- Animate Projection Zoom
- Pan an Enlarged Image

Overview of Projection Zoom Callouts

To project an area of an image, open the Presentation Toolbar and select the Area Projection tool. Using either a mouse or light pen, click and drag to draw a box around the area you want to project. When you release the mouse or light pen button, the projection appears with lines indicating the position of the projected area in relation to the original item, as shown in the figure below.

A maximum of ten (10) projections can be used simultaneously, but the Area Projection tool must be selected again before a new projection can be drawn.


Click and drag the corner of the projection window to resize the projected area
Click and drag to move the Projection window
This is the selected area or magnifier
Click and drag the magnifier to project a different area of the source document
DEF-0677
00

You can resize the projected area by placing the cursor on any edge of the projection window. When the cursor changes to a double-sided arrow, click and drag the side to enlarge or reduce the window.

Click anywhere in the projection window and drag to move it to a new location.

Click and drag the magnifier to pan around the source exhibit. The projection window automatically updates to magnify the new area.

Close the projection window using one of the following methods:

- Double-click on the dimmed background of the item to close all projections associated with that item.

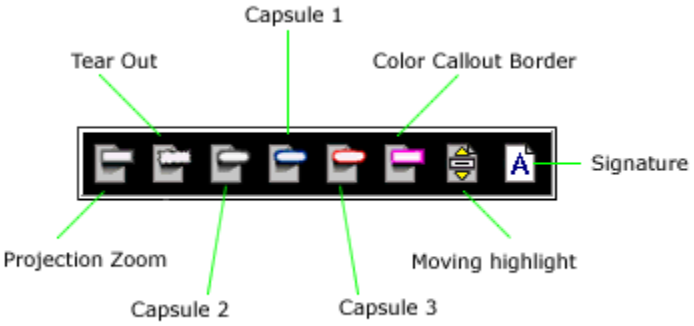
  OR

- Right-click on a specific projection window to close one particular projection.

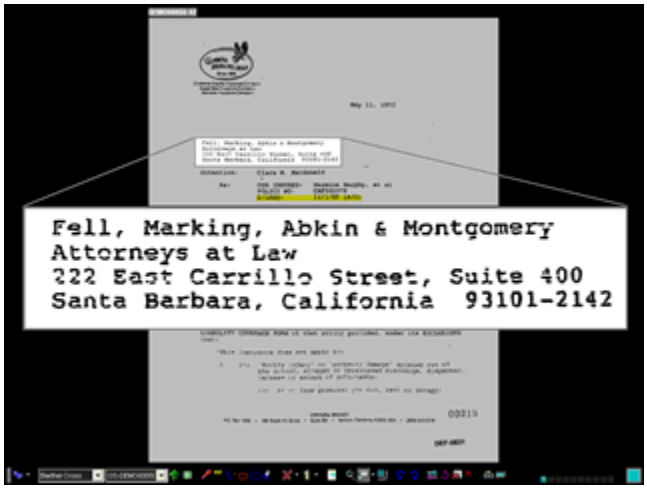
Note: Any changes made to the source document (annotations, enlargements, etc.) will automatically remove the projections.

Callout Styles Available

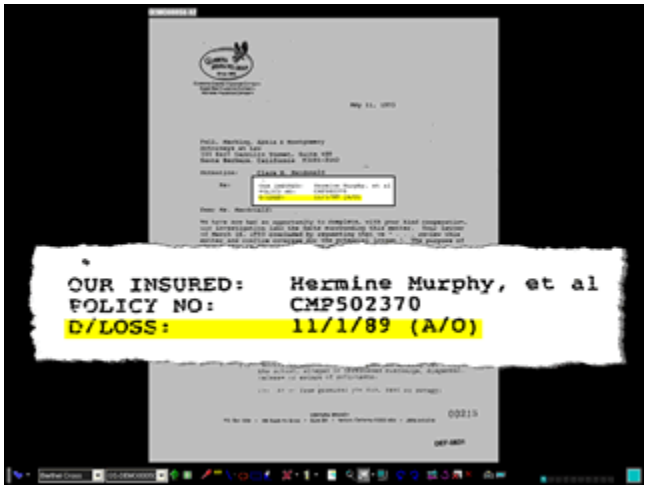
By clicking the down arrow on the right side of the call out tool, the selection box shown below is made available. The diagram below shows all of the call out selections available.



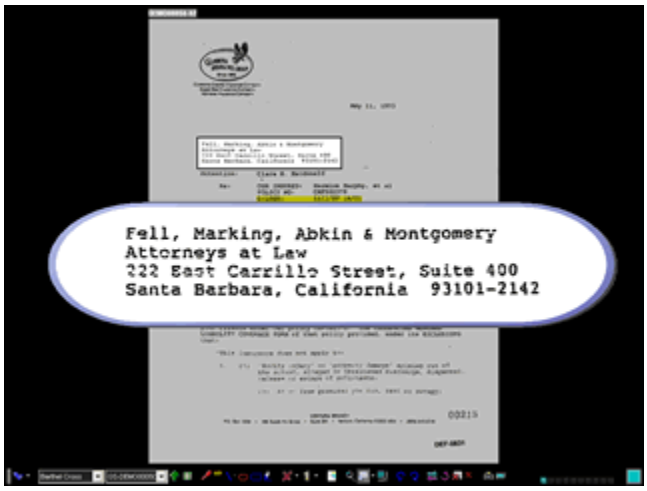
Examples of the selections are shown below:


Fell, Marking, Abkin & Montgomery
Attorneys at Law
222 East Carrillo Street, Suite 400
Santa Barbara, California 93101-2142

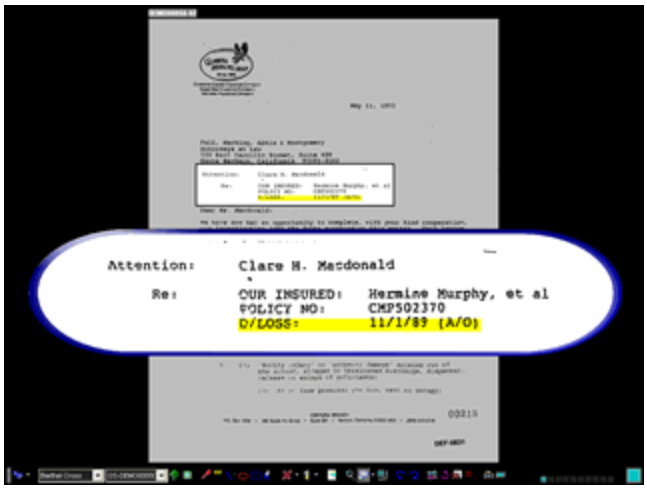
Projection zoom



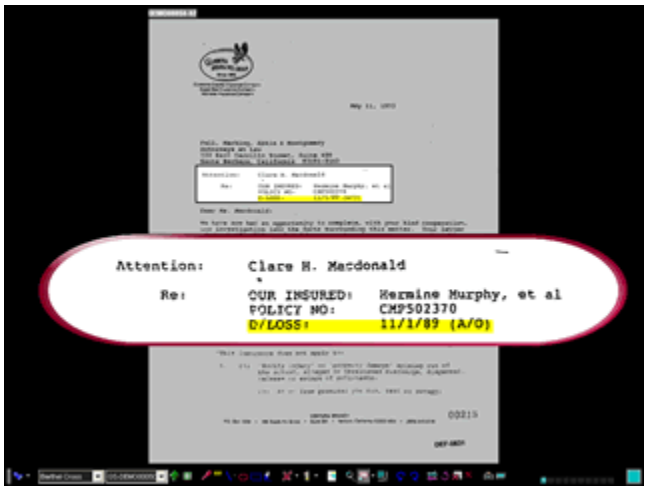
Tear out


Fell, Marking, Abkin & Montgomery
Attorneys at Law
222 East Carrillo Street, Suite 400
Santa Barbara, California 93101-2142

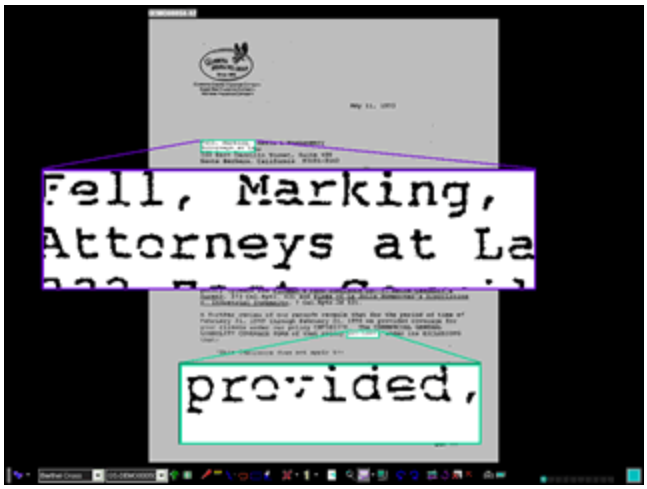
Capsule 1



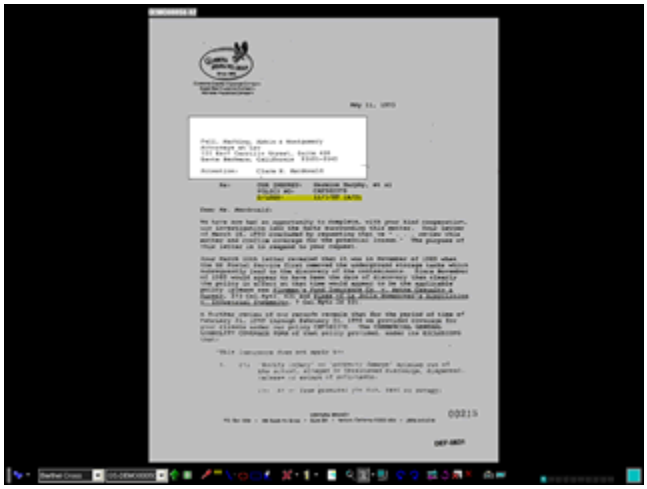
Capsule 2



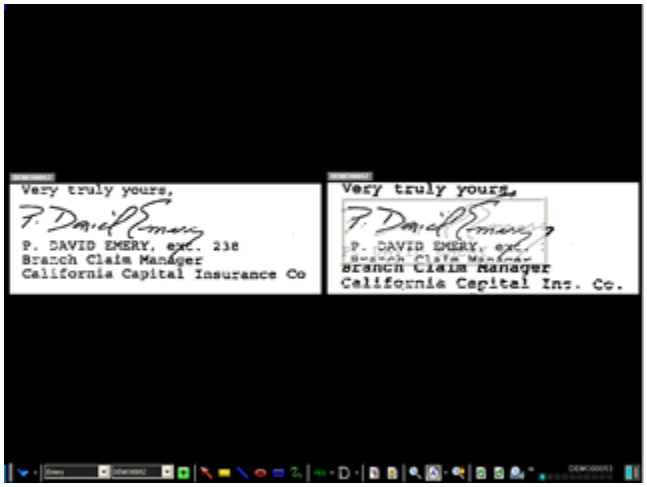
Capsule 3



Color borders callouts
(The border color changes each time a callout is drawn)



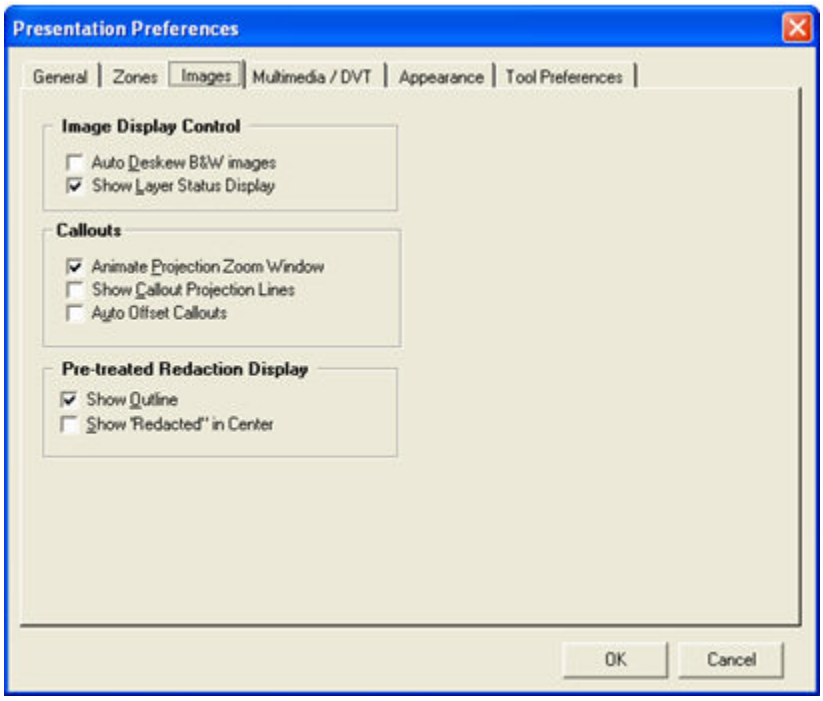
Moving highlight



Signature
(Creates an image from one image and layer it over the other for comparison. See Signatures)

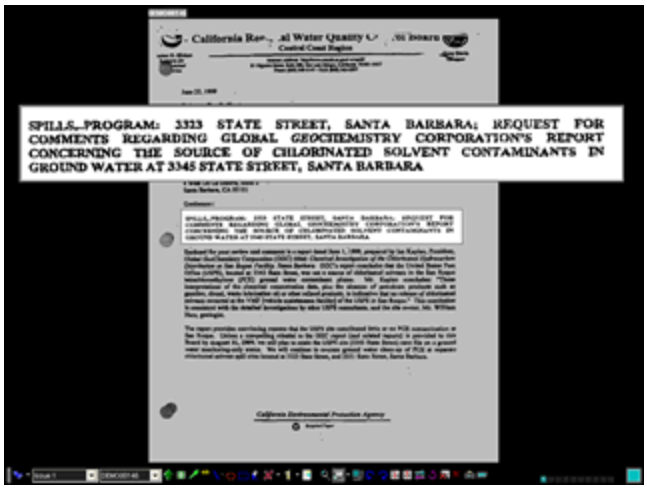
Area Projection Options

To change the Area Projection options, select **Preferences**. Then choose the Images tab, as shown in the figure below.



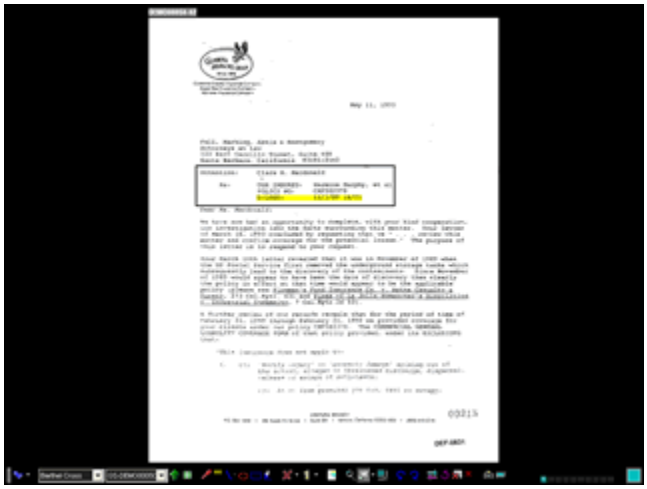
Hide the Projection Lines

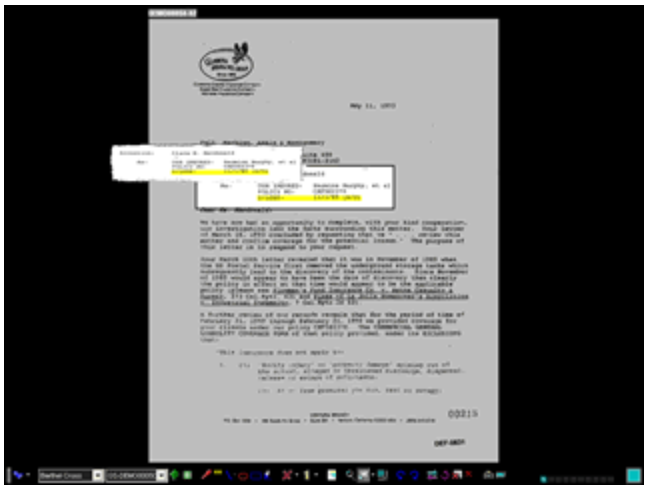
To hide the projection lines, un-check the **Show Callout Projection Lines** option and click **[OK]**. When you use the Area Projection tool, projection lines will not appear, as shown in the figure below.

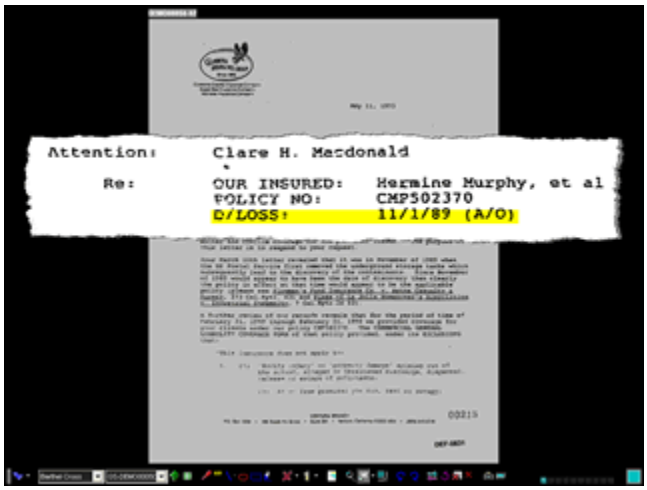

SPILLS PROGRAM: 3333 STATE STREET, SANTA BARBARA; REQUEST FOR COMMENTS REGARDING GLOBAL GEOCHEMISTRY CORPORATION'S REPORT CONCERNING THE SOURCE OF CHLORINATED SOLVENT CONTAMINANTS IN GROUND WATER AT 3345 STATE STREET, SANTA BARBARA

Animate Projection Zoom

To animate projection zoom, check the **Animate Projection Zoom** option and click **[OK]**. When you use the Area Projection tool, the projected area will gradually enlarge to full size, as shown in the figures below.







When you close the projection, it will gradually retract in the same way.

Pan an Enlarged Item

Once an item has been enlarged, you can pan the item within the zoom window by right-clicking on the zoomed item and holding the mouse button down while moving the mouse. You can also press the **[Up]**, **[Down]**, **[Left]**, or **[Right]** arrow keys to pan the item in the active zone. If your light pen does not have a secondary button, use Right-Mouse Button Mode to right-click on an item.

More Information:

- Control the Presentation Display
- Presentation Toolbar

Tools

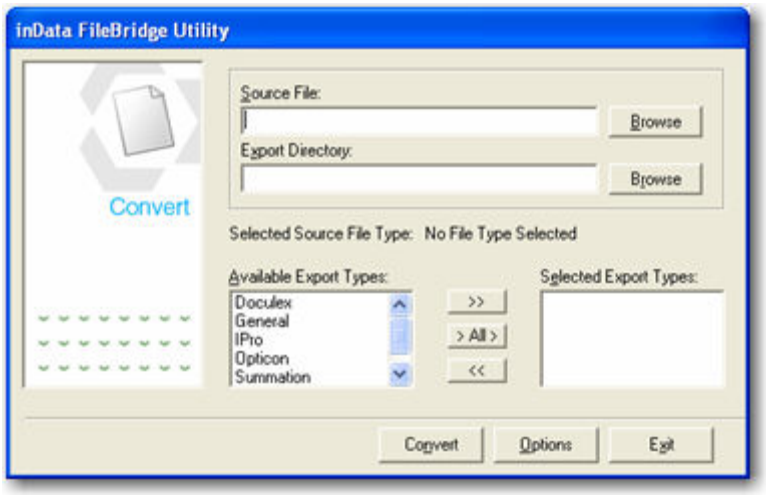
Tools Menu Utilities

TrialDirector provides several utilities under the Tools menu. These utilities are useful for file sharing operations. A fourth utility, used for importing LiveNote transcripts, is described in the Import Transcripts Help topic.

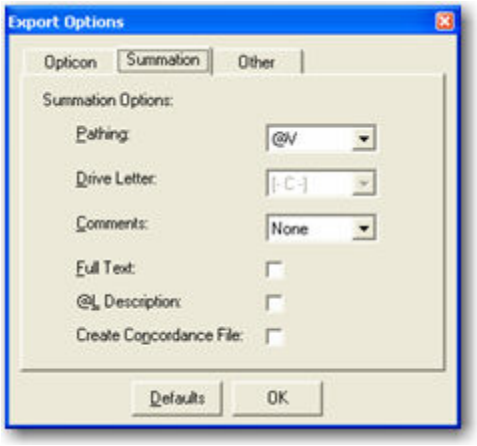
FileBridge

The FileBridge Utility is used to convert load files for one application into load files for an alternate application. For example, if you have a load file formatted for CT Summation Enterprise/iBlaze but you would like to use it to load files for TrialDirector, the FileBridge will convert the file for use with TrialDirector.

1. From the **Tools** menu, select the **FileBridge...** command. The FileBridge Utility dialog opens.

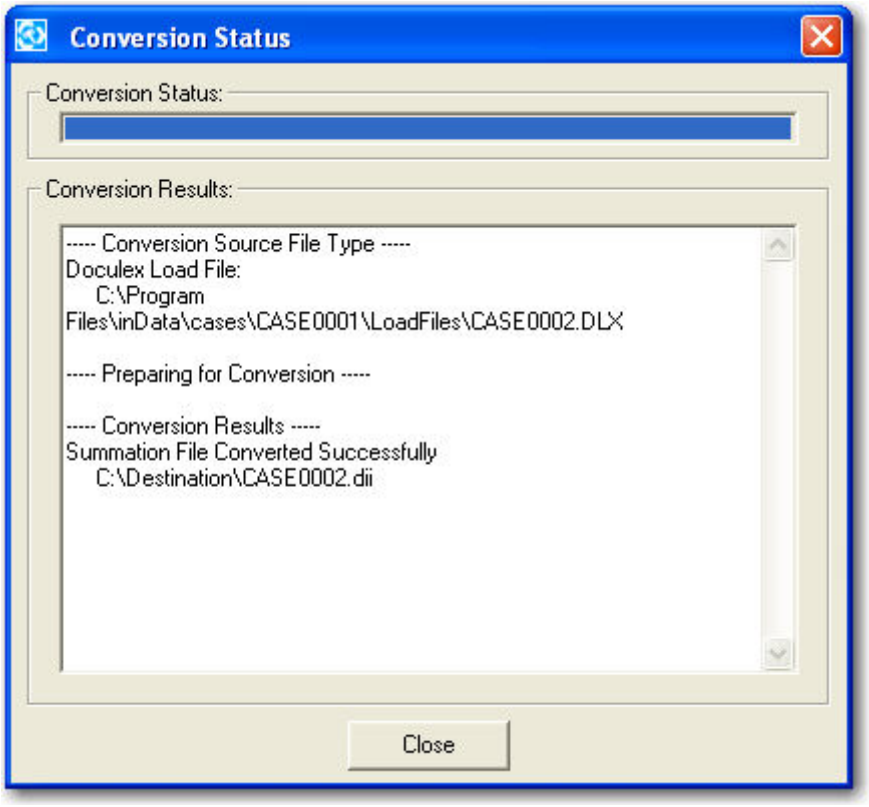


2. In the **Source File** field, enter or browse to the location of the file that you would like to have converted. In the **Export Directory** field, enter or browse to the location where you would like the converted file to be placed.
3. The **Available Export Types** box lists the programs that load files can be converted for. Select the program(s) that you will be creating load files for, then click to move the program name to the **Selected Export Types** list.
4. When all of the desired load file types have been added to the **Selected Export Types** list, click **Options**. There are specific options which can be set for Opticon & CT Summation conversions, and an **Other** tab that can be used to set the output Volume ID for any output type.



5. When all options have been set, click **Convert**.

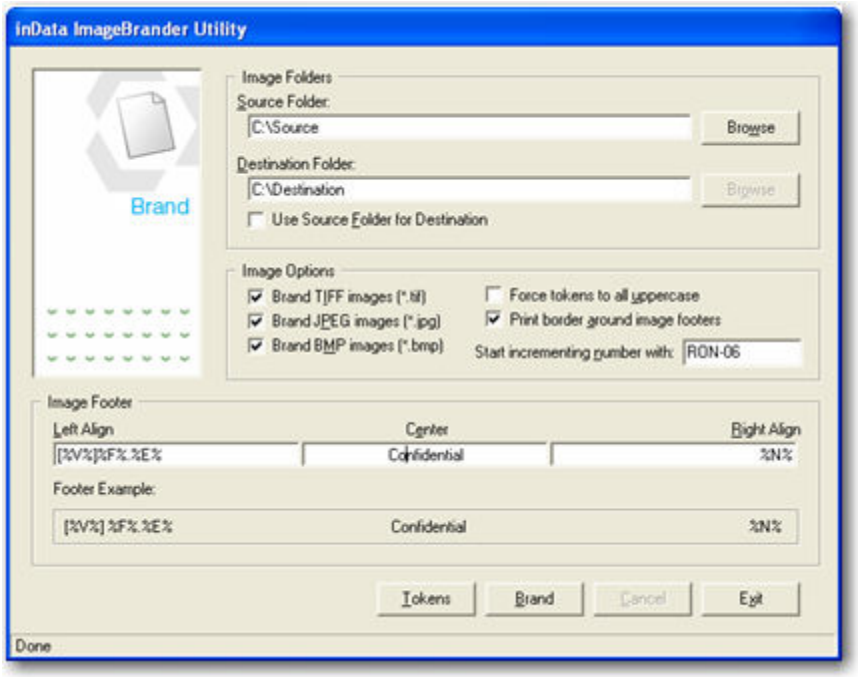
   The selected file will be converted to the desired format(s) and placed in the specified Export Directory. Results are shown in a Conversion Status window.



ImageBrander

ImageBrander is used to permanently mark image files with an identifying footer. This is useful to identify the source of images, especially when sharing images with opposing counsel. It can also be used to mark all images used in your case, if desired.

1. From the Tools menu, select the **ImageBrander...** command. The ImageBrander Utility dialog opens.

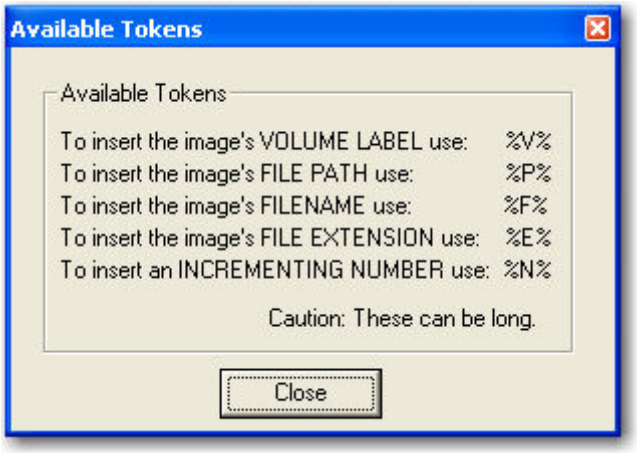


2. Enter **Source** and **Destination** folders in the fields provided. A check box is provided if your Source folder is also your Destination folder.

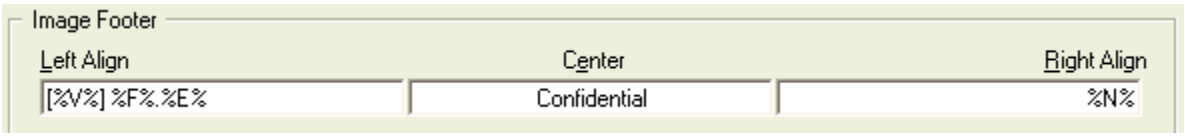
Note:*When adding a brand to a file, the branded files are duplicated in the Destination folder. If you set the Destination folder to be the same as the Source folder, the files in the Source folder will be branded. This process is not reversible!*

3. In the Image Options box, select the image types to be branded, token formatting, and border option. If an incremented number will be included, enter the starting number in the field provided.

   Tokens are codes that you can use to insert certain types of information in the brand. Click the Tokens button to display the list of available tokens.


Available Tokens
Available Tokens
To insert the image's VOLUME LABEL use: %V%
To insert the image's FILE PATH use: %P%
To insert the image's FILENAME use: %F%
To insert the image's FILE EXTENSION use: %E%
To insert an INCREMENTING NUMBER use: %N%
Caution: These can be long.
Close

4. In the Image Footer box, enter your desired brand using text or tokens. To add the brand to the images in your Source folder, click **Brand.**

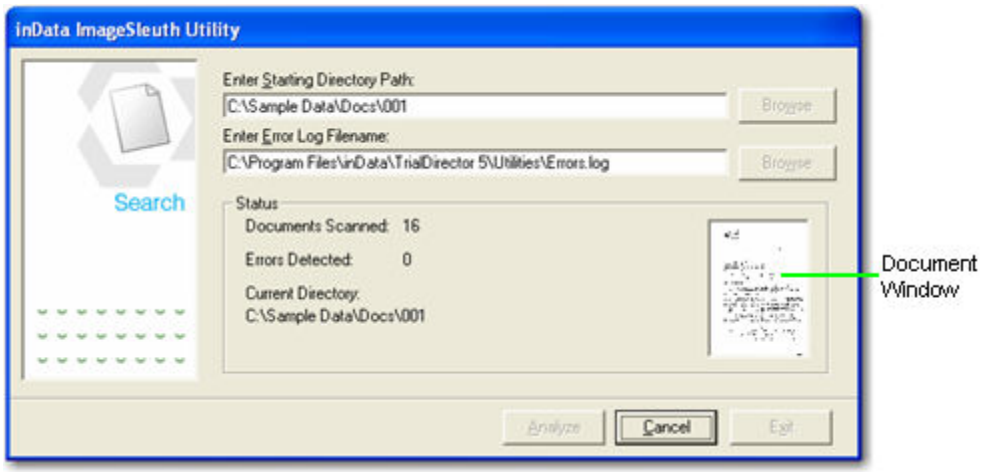


Using the tokens shown in the Image Footer example above produced the brand shown below. Note that a period was added between the F & E tokens in the Left Align field to make the file name/file extension appear normal.

ImageSleuth

ImageSleuth is used to search for corrupt or mislabeled .tif files.

1. From the Tools menu, select the **ImageSleuth...** command. The ImageSleuth Utility dialog opens.



2. In the **Enter Starting Directory Path** field, specify the file folder that you would like to verify. A default Error Log location will be specified for you, but you can change it if desired.
3. Click **Analyze**. The ImageSleuth utility will open each file in the specified directory to verify that it is a correctly formatted .tif file. Each file will briefly display in the document window during this process.
4. When the analysis is complete, a completion dialog will appear. If errors are detected, open the log file to identify the affected files.

Image Sleuth
Inspection is complete.
0 error(s) were found and logged. Would you like to view the error log at this time?
Yes
No

TimeCoder

Timecoding

Timecoding a transcript is synchronizing the ASCII transcript to the multimedia file by setting time stamps on each line of the transcript. This allows synchronized playback of video files and an accompanying transcript.

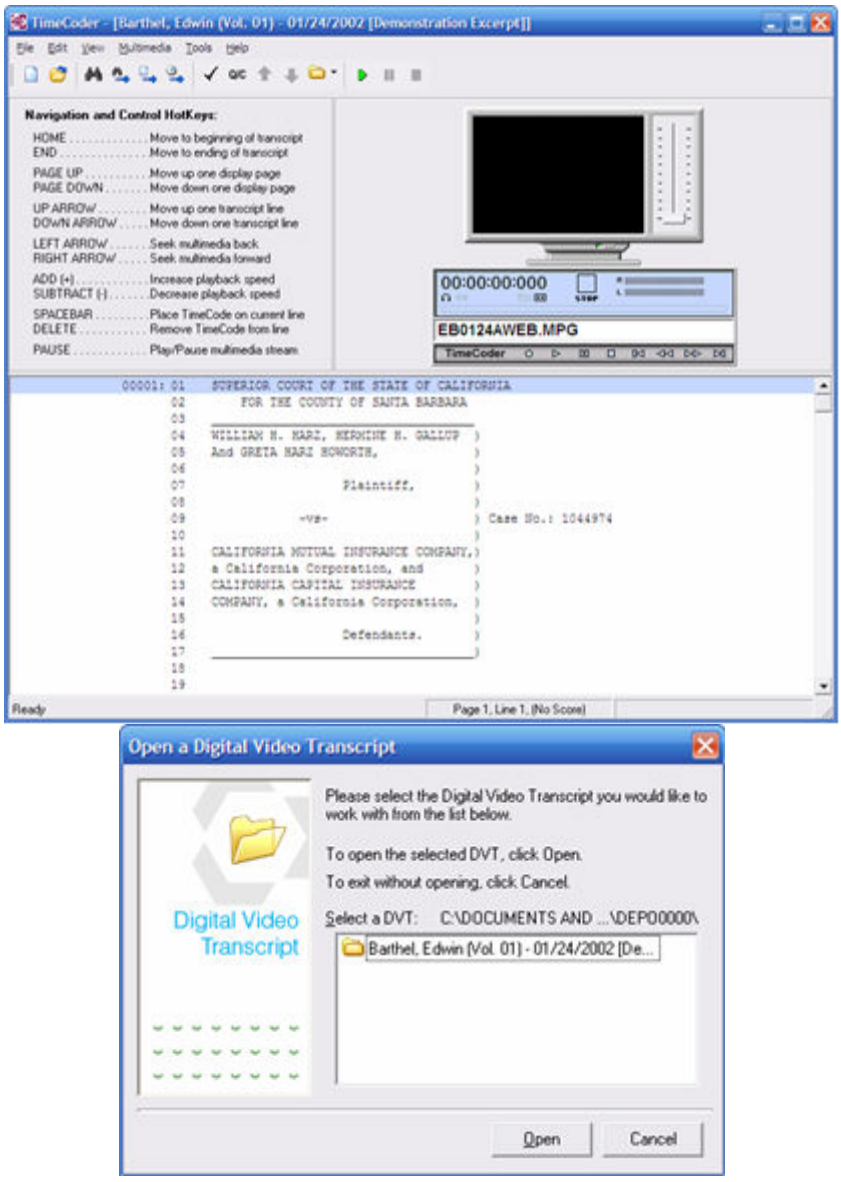
TrialDirector includes a simple timecoding tool (TimeCoder) which is very effective for small jobs. If you will be performing a large amount of timecoding, we recommend that you obtain a copy of inData's TimeCoder Pro. Timecoder Pro automates the process of timecoding, as well as performing the synchronization as much as 20 times faster than realtime.

Note: *Before beginning the timecoding process, ensure that the appropriate DVT has been created and that at least one of the corresponding multimedia files has been loaded.*

Timecoding a Transcript

To begin timecoding a transcript,

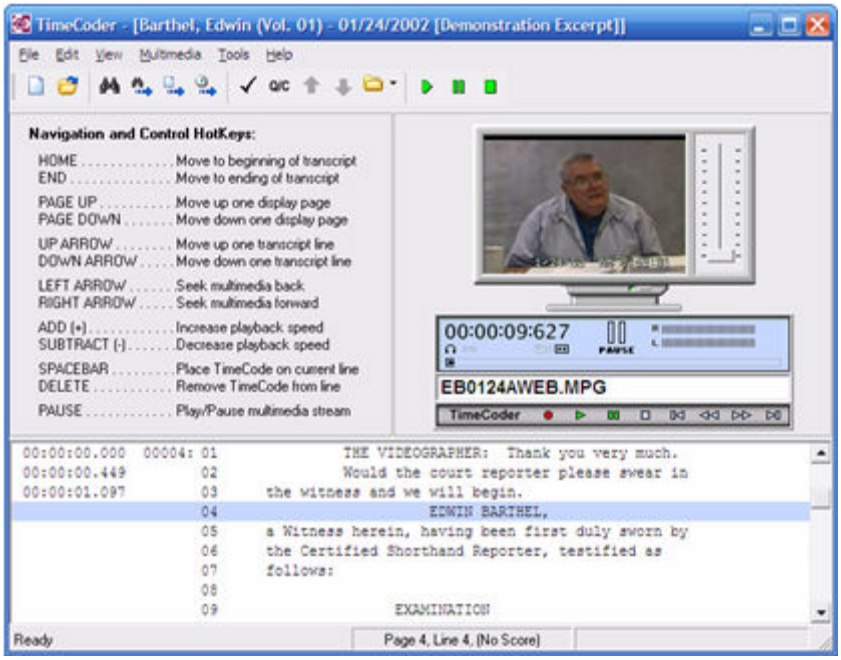
1. From the **Tools** menu, select **Timecoder...**. The following windows appear:


TimeCoder - [Barthel, Edwin (Vol. 01) - 01/24/2002 [Demonstration Excerpt]]
File Edit View Multimedia Tools Help
Navigation and Control HotKeys:
HOME ..... Move to beginning of transcript
END ..... Move to ending of transcript
PAGE UP ..... Move up one display page
PAGE DOWN ..... Move down one display page
UP ARROW ..... Move up one transcript line
DOWN ARROW ..... Move down one transcript line
LEFT ARROW ..... Seek multimedia back
RIGHT ARROW ..... Seek multimedia forward
ADD (+) ..... Increase playback speed
SUBTRACT (-) ..... Decrease playback speed
SPACEBAR ..... Place TimeCode on current line
DELETE ..... Remove TimeCode from line
PAUSE ..... Play/Pause multimedia stream
00:00:00:000
EB0124AWEB.MPG
TimeCoder
SUPERIOR COURT OF THE STATE OF CALIFORNIA
FOR THE COUNTY OF SANTA BARBARA
WILLIAM H. HARI, KERSTINE H. GALLUP
And GRETA HARI HOWORTH,
Plaintiff,
-vs-
Case No.: 1044974
CALIFORNIA MUTUAL INSURANCE COMPANY,
a California Corporation, and
CALIFORNIA CAPITAL INSURANCE
COMPANY, a California Corporation,
Defendants.
Ready
Page 1, Line 1, (No Score)
Open a Digital Video Transcript
Please select the Digital Video Transcript you would like to work with from the list below.
To open the selected DVT, click Open.
To exit without opening, click Cancel.
Digital Video Transcript
Select a DVT: C:\DOCUMENTS AND ...\DEPO0000\
Barthel, Edwin (Vol. 01) - 01/24/2002 [De...
Open
Cancel

2. In the **Open a Digital Video Transcript** window, select the appropriate multimedia file from the Multimedia Selection Box. If there are no multimedia files to choose from, load the appropriate multimedia files.
3. Find the place in the transcript where the selected multimedia file begins. To do this, click **Play** on the Multimedia Control Box, listen to the first few words of the multimedia file and then search for those words in the ASCII transcript using the **Find** command under the **Edit** menu.

Note: *If you cannot locate the first words of the multimedia file, advance the multimedia file and try again since the transcription may begin further into the multimedia file.*

4. When you have found the beginning of the multimedia file in the transcript, verify that the blue highlighter bar is on the line of transcript that corresponds to the beginning of the multimedia file. Click the **Seek to Start** button on the Multimedia Control Box to rewind the multimedia file to the beginning.
5. Click **Record** on the Multimedia Control Box to enter Timecoding Mode.
6. Click **Play** on the Multimedia Control Box to begin playback of the multimedia file.
7. When the multimedia file reaches the first word of the transcript line that is currently highlighted in blue, press the SPACEBAR. The current multimedia time is stamped on the left side of the transcript line, as shown below.


TimeCoder - [Barthel, Edwin (Vol. 01) - 01/24/2002 [Demonstration Excerpt]]
File Edit View Multimedia Tools Help
Navigation and Control HotKeys:
HOME ..... Move to beginning of transcript
END ..... Move to ending of transcript
PAGE UP ..... Move up one display page
PAGE DOWN ..... Move down one display page
UP ARROW ..... Move up one transcript line
DOWN ARROW ..... Move down one transcript line
LEFT ARROW ..... Seek multimedia back
RIGHT ARROW ..... Seek multimedia forward
ADD (+) ..... Increase playback speed
SUBTRACT (-) ..... Decrease playback speed
SPACEBAR ..... Place TimeCode on current line
DELETE ..... Remove TimeCode from line
PAUSE ..... Play/Pause multimedia stream
00:00:09:627
EB0124AWEB.MPG
TimeCoder
00:00:00.000 00004: 01 THE VIDEOGRAPHER: Thank you very much.
00:00:00.449 02 Would the court reporter please swear in
00:00:01.097 03 the witness and we will begin.
04 EDWIN BARTHEL,
05 a Witness herein, having been first duly sworn by
06 the Certified Shorthand Reporter, testified as
07 follows:
08
09 EXAMINATION
Ready
Page 4, Line 4, (No Score)

8. Continue this process until you reach the end of the multimedia file. If you miss a line or stamp a line incorrectly, use the appropriate keyboard commands to edit your mistakes (see Editing Timecodes below).

Note: *You must be in Timecoding Mode to edit timecodes. To enable Timecoding Mode, click the* ***Record*** *button so that it is red.*

9. If there are additional multimedia files, repeat steps 2 through 8 until the entire transcript has been timecoded. When the entire transcript has been timecoded, you can export the Digital Video Transcript.

Editing Timecodes

The sections below explain how to correct the two most common errors made while timecoding a transcript. You must be in Timecoding Mode in order to edit timecodes. To enable Timecoding Mode, click the **Record** button so that it is red.

***Note**: When editing timecodes, ensure that the timecodes are in chronological order. For example, the timecode 00:00:15 cannot be preceded by 00:00:30.*

Timecoding a Missed Line

If you do not press the spacebar in time to place a timecode on a line of transcript, simply rewind the multimedia file by pressing the LEFT ARROW key on your keyboard. When the multimedia file reaches the appropriate position again, press the SPACEBAR and continue timecoding as you normally would.

Changing an Incorrect Timecode

If you press the SPACEBAR at the incorrect time or on the incorrect line, pause the multimedia file by clicking **Pause** or by selecting **Pause** from the **Multimedia** menu. Then use the UP ARROW or DOWN ARROW on your keyboard to move the highlighter to the line with the incorrect timecode. Press the DELETE key on your keyboard to erase the timecode. Rewind or advance the multimedia file as necessary and click **Play** or select **Play** from the **Multimedia** menu. When the multimedia file reaches the appropriate position again, press the SPACEBAR and continue timecoding as you normally would.

***Note:** If you are in Timecoding Mode and the highlight bar is on a line that already has a timecode, pressing the SPACEBAR will overwrite the old timecode with a new timecode that corresponds to the current time in the Multimedia Control Box.*

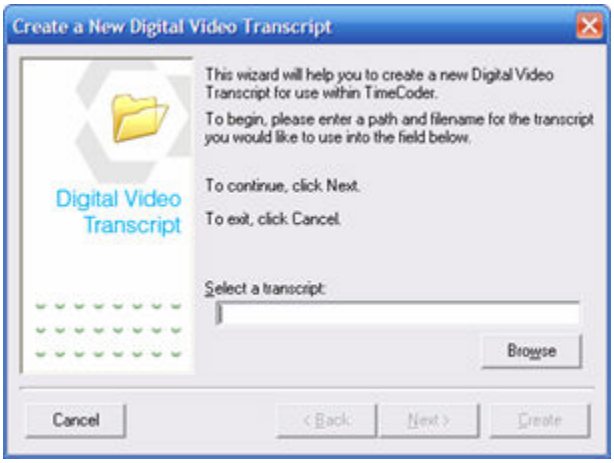
More Information:

- Exporting a Digital Video Transcript

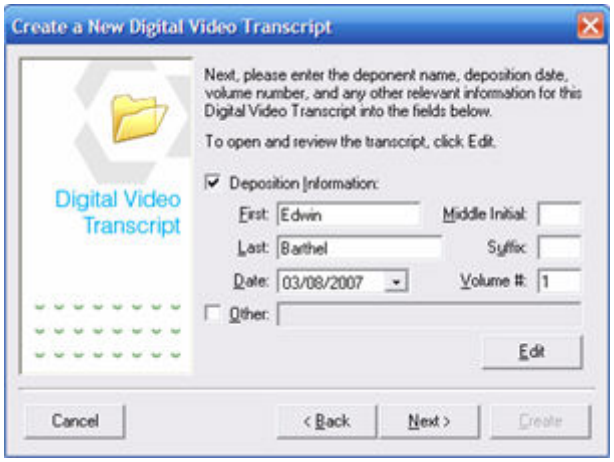
Creating a Digital Video Transcript (DVT)

During the DVT creation process, the deposition transcript is processed into the DVT database. You can also process the associated Audio/Video reference files along with a pre-timecoded transcript.

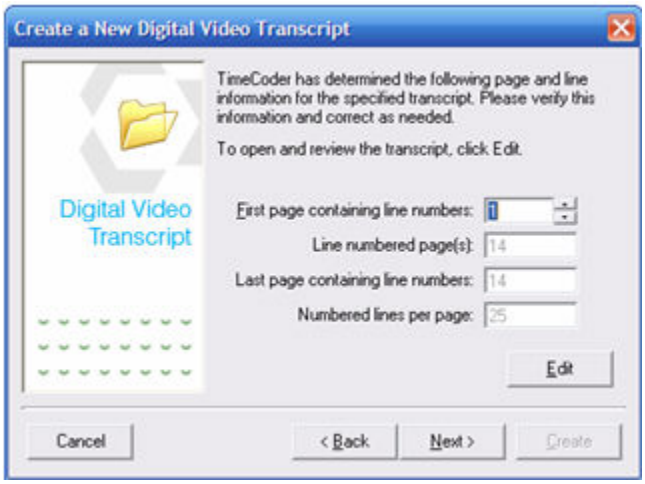
1. To create a new DVT, select **Create a New Digital Video Transcript** from the **File** menu. The following dialog will appear:


Create a New Digital Video Transcript
This wizard will help you to create a new Digital Video Transcript for use within TimeCoder.
To begin, please enter a path and filename for the transcript you would like to use into the field below.
To continue, click Next.
To exit, click Cancel.
Digital Video Transcript
Select a transcript:
Browse
Cancel
< Back
Next >
Create

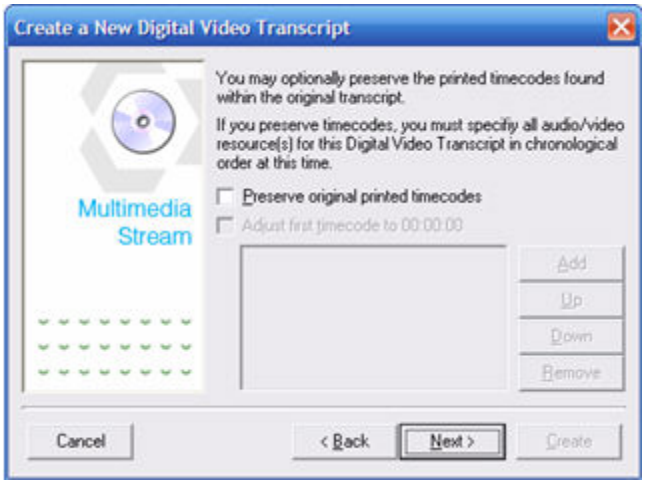
2. Click **Browse** to select the deposition transcript you wish to use. Click **Next** to continue. The following screen will appear:



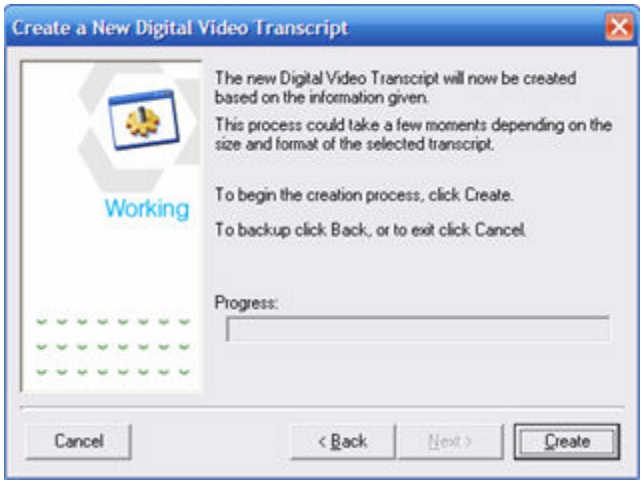
3. Enter the deponent information as shown in the screen above. You can use the 'Other' field to include other case or deposition information. Click **Edit** if you wish to view the actual transcript text file. Click **Next** to continue. The screen below will appear:


Create a New Digital Video Transcript
TimeCoder has determined the following page and line information for the specified transcript. Please verify this information and correct as needed.
To open and review the transcript, click Edit.
Digital Video Transcript
First page containing line numbers: 1
Line numbered page(s): 14
Last page containing line numbers: 14
Numbered lines per page: 25
Edit
Cancel
< Back
Next >
Create

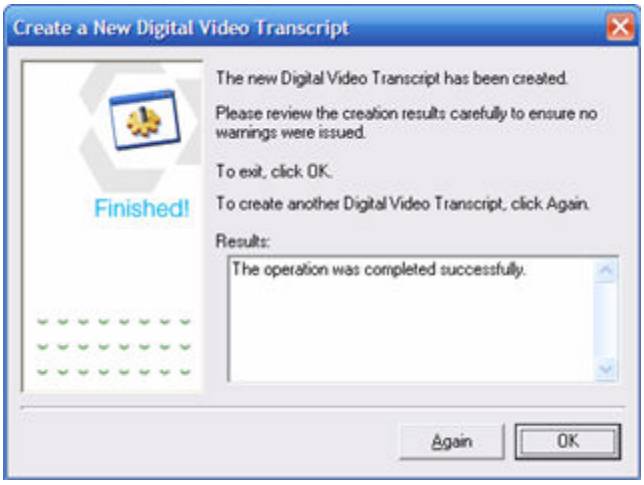
4. Confirm the page and line information for the transcript text file. Click **Edit** if you wish to view the actual transcript text file. Click **Next** to continue. The following screen will appear:


Create a New Digital Video Transcript
You may optionally preserve the printed timecodes found within the original transcript.
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve original printed timecodes
Adjust first timecode to 00:00:00
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

5. You have the option to preserve the original timecodes within a deposition transcript, if they exist. Click here to view the steps involved to preserve timecodes. If you wish to import the transcript without timecodes, click **Next** to continue.
6. Click **Create** to begin the DVT creation process.


Create a New Digital Video Transcript
The new Digital Video Transcript will now be created based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

5. After the process is completed, click **Next** to continue. After the DVT has been created, the screen below is displayed so you can review the creation results.


Create a New Digital Video Transcript
The new Digital Video Transcript has been created.
Please review the creation results carefully to ensure no warnings were issued.
Finished!
To exit, click OK.
To create another Digital Video Transcript, click Again.
Results:
The operation was completed successfully.
Again
OK

8. Click **OK** to open the newly created DVT or click **Again** to create another DVT.

More Information:

- Timecoding

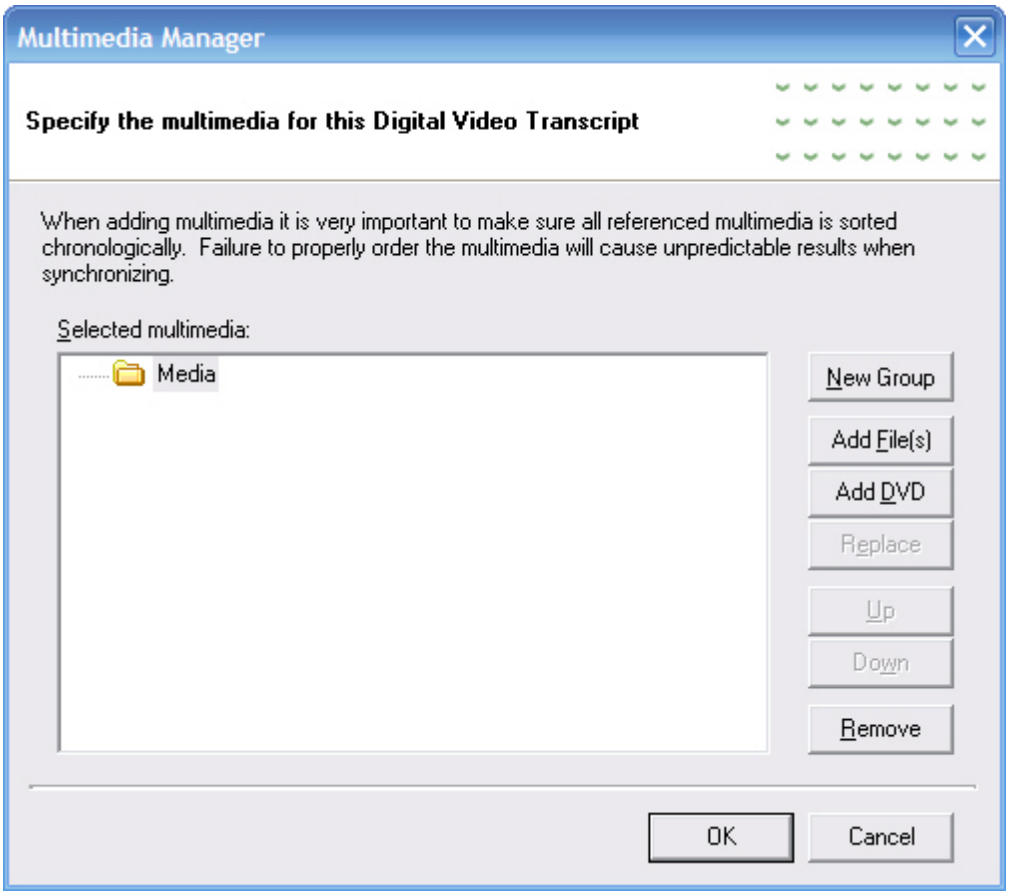
Multimedia Manager

After you create a new Digital Video Transcript (DVT), you need to add one or more audio/video files using the Multimedia Manager. If you have multiple audio/video files that accompany a transcript, use the Multimedia Manager to organize the files before you synchronize (timecode) the transcript with them.

To open the Multimedia Manager:

On the **Multimedia** menu, click **Multimedia Manager**.

Note to v5 Users: Use the **Add Files** and **Up**/**Down** buttons to add and organize your files just as you did in the former Multimedia Stream Manager. The new buttons offer advanced organization capabilities, but are not required.



Adding Individual Files (such as MPEG, AVI, or WMV)

1. Click **Add Files** to select one or more multimedia resource files to add to the DVT.
2. Browse to the location of the multimedia file(s) and select. To select more than one file, press and hold CTRL.

3. Click **Open**.
4. The file(s) appear in the Multimedia Manager. If they are not in chronological order, use the **Up** and **Down** buttons to adjust the position of the multimedia resources as necessary.
   The files must be in order to ensure accuracy when the transcript is synchronized (timecoded) with the multimedia files.

   The path of each multimedia resource file is used in the *.cms file exported from TimeCoder Pro. Once the *.cms file is loaded into TrialDirector, the user may have to browse to the multimedia file location if the path is different.

5. If you are finished adding and organizing multimedia files, click **OK** to return to the transcript.

Adding a DVD-Video or Video CD

Use the Add DVD button whenever you are loading files from a DVD or VCD, or when the contents of the DVD/VCD has been copied to a folder on a local or network drive.

Note: Super Video CDs (SVCDs) are *not* supported.

1. Click **Add DVD**.
2. If the disc is currently mounted in a drive, browse to and select the drive letter.
   -or-
   If the disc contents has been copied on to a local or network drive, browse to and select the root folder of the DVD/VCD contents.
3. Click **OK**.
   The inData Digital Video Disc (DVD) Extractor automatically opens.
4. Use the inData Digital Video Disc (DVD) Extractor to convert the video to an MPEG-2 stream. Then, select the .MPG file and click **Open**.
5. Repeat the previous steps for any additional DVDs/VCDs.

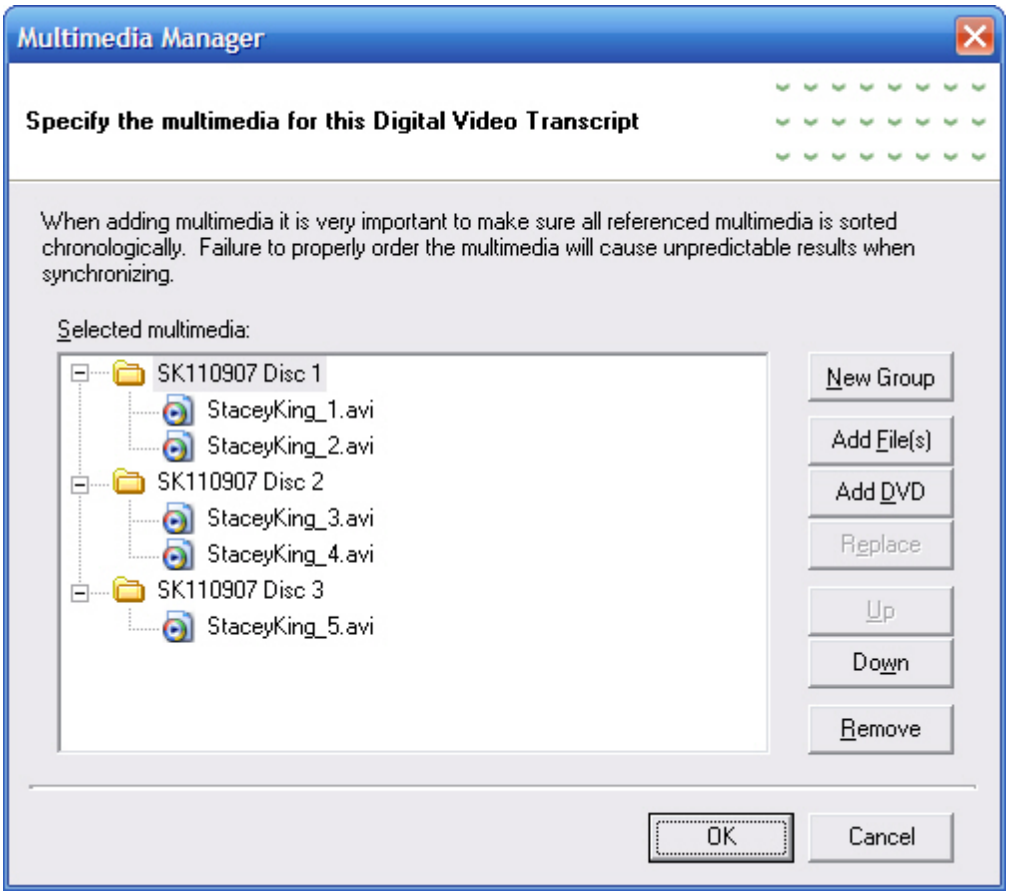
Grouping Files for Export (Advanced Users)

If you will be exporting a synchronized transcript and multimedia files across multiple CDs/DVDs, you can use groups to designate which files should go on which discs.

1. In the Multimedia Manager, click the **New Group** button.
   A folder named Untitled Multimedia Group appears.
2. Click once on the folder name to select it. Then, click again to insert the cursor on the text. Type a meaningful name for the group (for example, the deponent's initials, deposition date, and the disc number: SK110907 Disc1).
3. Repeat the previous steps to create groups for ..Disc2, ..Disc3, etc. as needed.
4. Select a file and click the **Up**/**Down** buttons as needed to move it to the appropriate location under the appropriate group. Repeat for each file. **Ensure all files are in**

chronological order on each disc.

The following example shows the structure for a deposition expected to span three discs when it is exported:

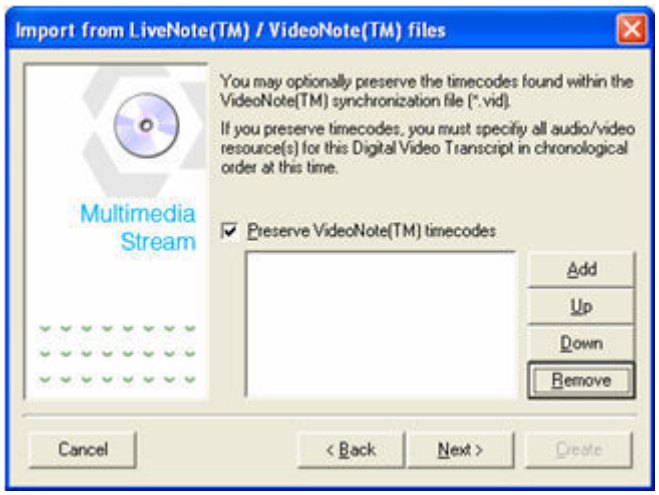


5. When you are finished organizing files in groups, click **OK**.
   You can return to the Multimedia Manager at any time before you export the synchronized transcript and multimedia files to CDs/DVDs to reorganize or replace them as needed.

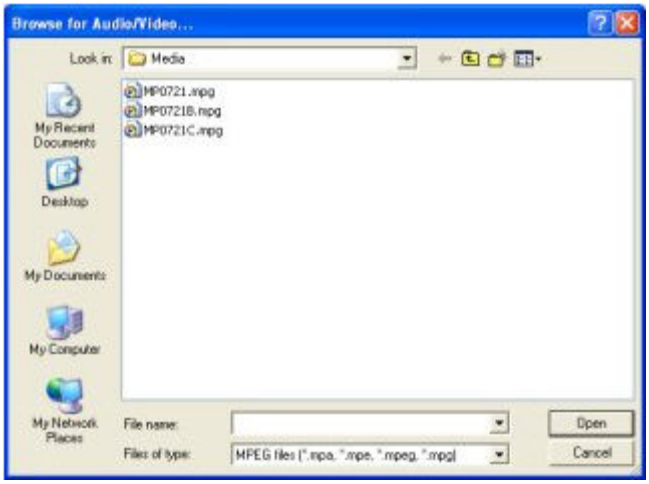
TimeCoder - Preserve VideoNote™ Transcript Timecodes

To preserve the existing VideoNote™ timestamps during import,

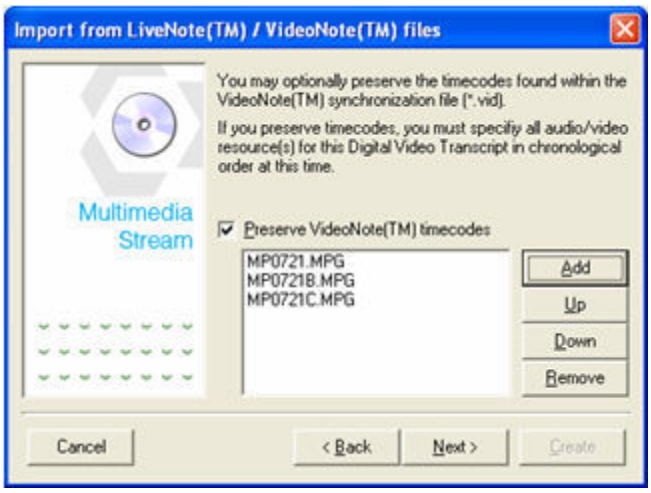
1. Check the **Preserve VideoNote™ timecodes** option, as shown below.


Import from LiveNote(TM) / VideoNote(TM) files
You may optionally preserve the timecodes found within the VideoNote(TM) synchronization file (*.vid).
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve VideoNote(TM) timecodes
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

2. Click **Add** to specify one or more audio/video resources that correspond with the original VideoNote (*.vid) file.



3. Select the audio/video file(s) and click **Open** to add the selection(s) to the list.
4. Repeat the process until all audio/video reference files have been added to the list.



5. If the multimedia resource files are not in chronological order, use the **Up** or **Down** buttons to adjust the position of the multimedia resources as necessary.
6. When all of the audio/video reference files have been added, click **Next** to continue.

More Information:

- Importing Digital Video Transcripts
- Import LiveNote™ / VideoNote™ Files

Preserving Existing Transcript Timecodes

Important Information About Transcript Timecodes

During the Digital Video Transcript (DVT) creation process, users are given the option to preserve timecodes. This option is designed to preserve existing timecodes within the deposition transcript used during the DVT creation process. Timecodes are usually generated in a transcript by the court reporter using "real-time" steno software.

Below are some requirements of a transcript when preserving timecodes:

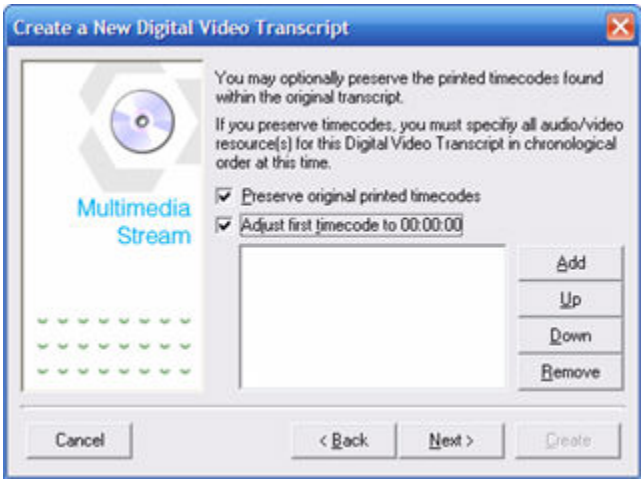
- Timecodes must exist on the left margin.
- Timecodes must be in SMPTE format (HH:MM:SS). An example of this format is 01:23:10.
- Timecodes must not exceed 24 hours in duration.

Note: *Timecodes may be in a linear format or time of day format, as long as they adhere to the SMPTE format.*

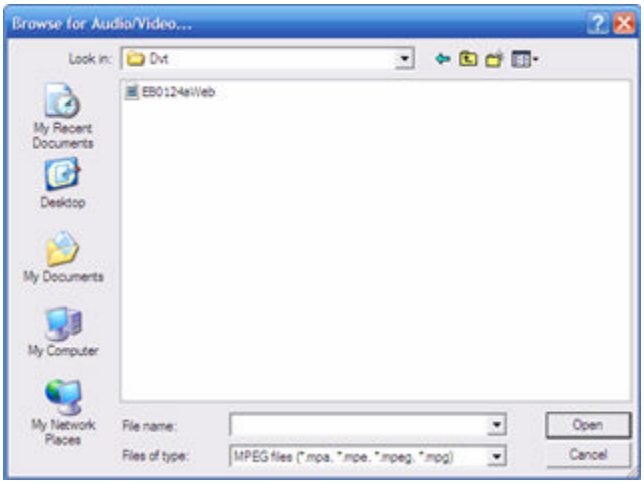
Preserving Transcript Timecodes During DVT Creation Process

Preserving timecodes is a multi-step process. Follow the steps below to preserve timecodes.

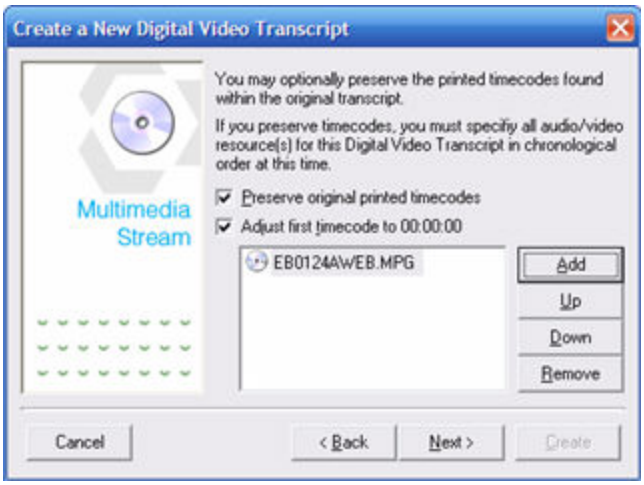
1. During the DVT creation process, the dialog below appears allowing one to preserve timecodes within the deposition transcript if desired. Check the "Preserve original printed timecodes" option, as shown below.


Create a New Digital Video Transcript
You may optionally preserve the printed timecodes found within the original transcript.
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve original printed timecodes
Adjust first timecode to 00:00:00
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

2. Optionally, you can deselect the "Adjust first timecode to 00:00:00" option. This option will readjust timecodes to offset at 00:00:00 in order to list the timecodes in a linear fashion. If you wish to maintain timecodes in their original state (ex. time of day), you can uncheck this option. For best results, we recommend leaving this option checked.
3. Next, the associated audio/video resource(s) for the Digital Video Transcript must be added in chronological order. This process will determine the running time(s) of the audio/video resource(s), then match those resources against the timecodes within the deposition transcript. Click **Add** to begin adding the audio/video resources. The following window will appear:



4. Browse to the location of the first audio/resource file and select **Open** to add to the list. Repeat the process for any other additional audio/video reference files. When completed, the audio/video reference files will appear in the list as depicted below.


Create a New Digital Video Transcript
You may optionally preserve the printed timecodes found within the original transcript.
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve original printed timecodes
Adjust first timecode to 00:00:00
EB0124AWEB.MPG
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

5. Click **Next** to continue through the process. After the DVT has been created, the timecodes will appear within the deposition transcript. Also, the associated audio/video reference files are available to review.
6. Check the synchronization of the DVT by playing back each of the associated audio/video references. Slide the seek bar (on the Multimedia Control Box) to various places within the reference file to make sure the playback is in synchronization with the timecoded transcript. You may have to adjust timecodes as necessary. After you have checked the DVT for proper synchronization, it can be exported.

More Information:

- Timecoding

TimeCoder - Q/C Timecodes

TimeCoder Q/C feature that allows the user to quickly review and update timecodes after timecoding. The Q/C feature will clearly mark, in red, each line that does not contain a timecode. Below are the steps to effectively Q/C timecodes.

Topics

- Enable Q/C Mode
- Q/C Mode Display
- Navigate Between Missing Timecodes
- Mark Missing Timecodes
- Using Extrapolate Timecodes Function

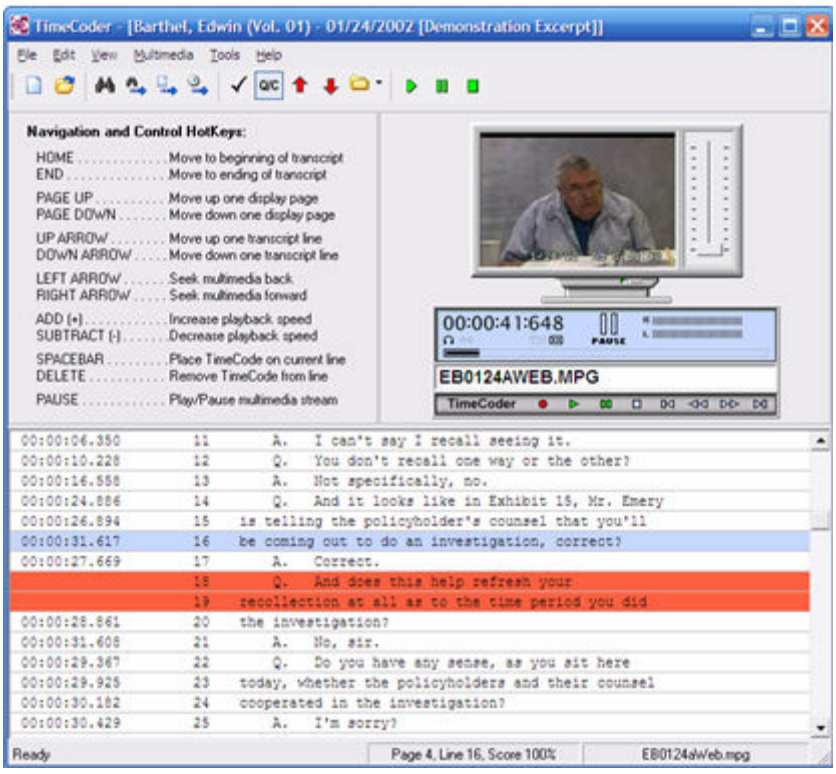
Note: *Normally, only transcript pages containing Question and Answer dialogue are included in the Q/C range. Transcript title pages and certification pages are not included when verifying timecoded lines.*

Enable Q/C Mode

1. First open the Digital Video Transcript you wish to check.
2. Click the Q/C button on the TimeCoder toolbar. Alternatively, select the **Enable Quality Control (QC) Mode** from the Edit menu.

Q/C Mode Display

When the TimeCoder Q/C mode is enabled, any transcript dialogue lines that do not have an associated timecode are marked in red.


TimeCoder - [Barthel, Edwin (Vol. 01) - 01/24/2007 [Demonstration Excerpt]]
File Edit View Multimedia Tools Help
Navigation and Control HotKeys:
HOME Move to beginning of transcript
END Move to ending of transcript
PAGE UP Move up one display page
PAGE DOWN Move down one display page
UP ARROW Move up one transcript line
DOWN ARROW Move down one transcript line
LEFT ARROW Seek multimedia back
RIGHT ARROW Seek multimedia forward
ADD (+) Increase playback speed
SUBTRACT (-) Decrease playback speed
SPACEBAR Place TimeCode on current line
DELETE Remove TimeCode from line
PAUSE Play/Pause multimedia stream
00:00:41:648
EB0124AWEB.MPG
TimeCoder
00:00:06.350 11 A. I can't say I recall seeing it.
00:00:10.228 12 Q. You don't recall one way or the other?
00:00:16.558 13 A. Not specifically, no.
00:00:24.886 14 Q. And it looks like in Exhibit 15, Mr. Emery
00:00:26.894 15 is telling the policyholder's counsel that you'll
00:00:31.617 16 be coming out to do an investigation, correct?
00:00:27.669 17 A. Correct.
18 Q. And does this help refresh your
19 recollection at all as to the time period you did
00:00:28.861 20 the investigation?
00:00:31.608 21 A. No, sir.
00:00:29.367 22 Q. Do you have any sense, as you sit here
00:00:29.925 23 today, whether the policyholders and their counsel
00:00:30.182 24 cooperated in the investigation?
00:00:30.429 25 A. I'm sorry?
Ready
Page 4, Line 16, Score 100%
EB0124aWeb.mpg

Note: *The light blue colored line indicates the current position within the Digital Video Transcript.*

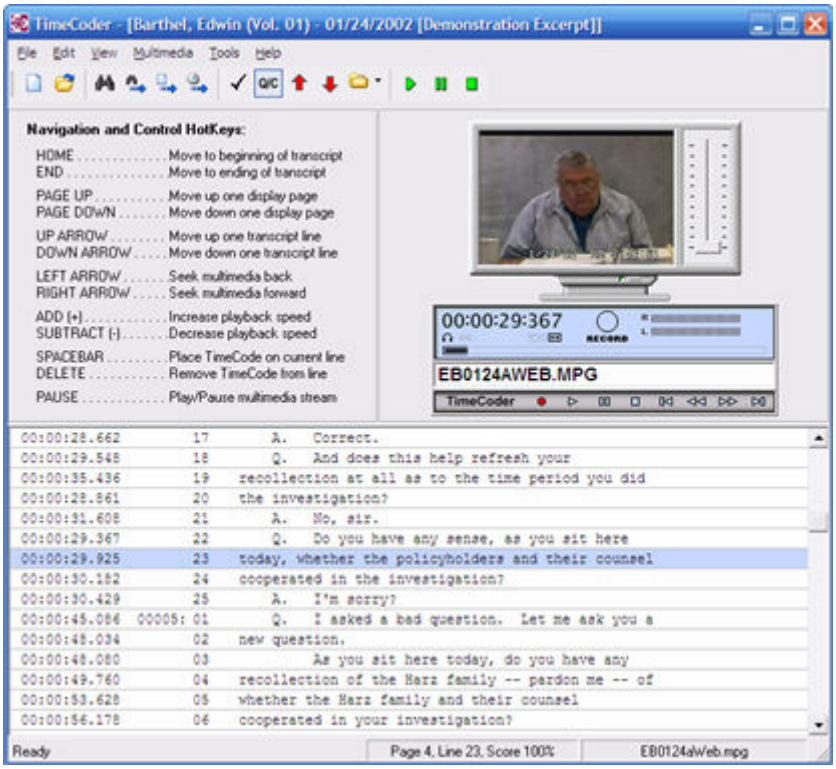
Navigate Between Missing Timecodes

When the transcript lines missing timecodes have been identified, the user can then navigate between each instance to manually timestamp that particular line. There are 2 methods for navigating between missing timecodes.

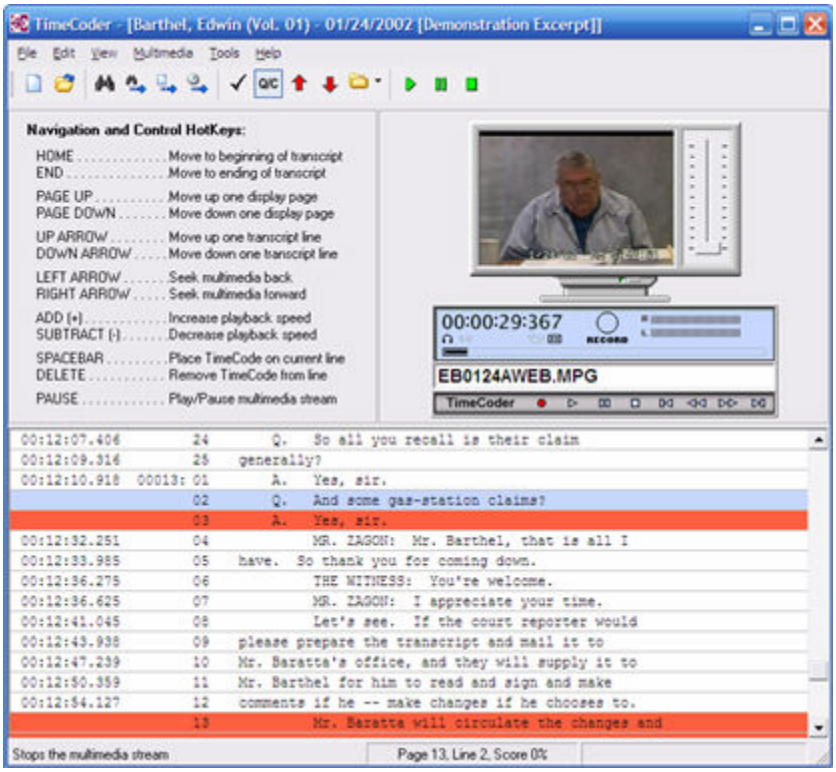
- Click the *Move to Previous Missing Timecode* and *Move to Next Missing Timecode* buttons on the TimeCoder Pro toolbar.
- Alternatively, use the **[N]** and **[B]** keys to move to the **N**ext Missing Timecode and **B**ack Missing Timecode. These keys are used because of their close proximity to the **[Spacebar]**.

Mark Missing Timecodes

- Begin playback of the Digital Video Transcript by clicking the **[Play]** button on the VCR Control.
- Enable Timecoding mode by clicking the record button within the VCR Controls. This button will turn red when the Timecoding mode is enabled.
- Use either the button or **[N]** key to move to the next missing timecode. Playback will commence from the timestamp located directly above the marked (red) line. This will give the Q/C operator ample time to mark the timestamp for the red line.
- Press the **[Spacebar]** to timestamp the red line. The **[Spacebar]** should be pressed at the first spoken word of the marked (red) line.
- The red line will turn to blue and the playback will continue., as shown below.


TimeCoder - [Barthel, Edwin (Vol. 01) - 01/24/2002 [Demonstration Excerpt]]
File Edit View Multimedia Tools Help
Navigation and Control HotKeys:
HOME ..... Move to beginning of transcript
END ..... Move to ending of transcript
PAGE UP ..... Move up one display page
PAGE DOWN ..... Move down one display page
UP ARROW ..... Move up one transcript line
DOWN ARROW ..... Move down one transcript line
LEFT ARROW ..... Seek multimedia back
RIGHT ARROW ..... Seek multimedia forward
ADD (+) ..... Increase playback speed
SUBTRACT (-) ..... Decrease playback speed
SPACEBAR ..... Place TimeCode on current line
DELETE ..... Remove TimeCode from line
PAUSE ..... Play/Pause multimedia stream
00:00:29:367
EB0124AWEB.MPG
TimeCoder
00:00:28.662 17 A. Correct.
00:00:29.548 18 Q. And does this help refresh your
00:00:35.436 19 recollection at all as to the time period you did
00:00:28.861 20 the investigation?
00:00:31.608 21 A. No, sir.
00:00:29.367 22 Q. Do you have any sense, as you sit here
00:00:29.925 23 today, whether the policyholders and their counsel
00:00:30.182 24 cooperated in the investigation?
00:00:30.429 25 A. I'm sorry?
00:00:45.086 00005: 01 Q. I asked a bad question. Let me ask you a
00:00:48.034 02 new question.
00:00:48.080 03 As you sit here today, do you have any
00:00:49.760 04 recollection of the Harz family -- pardon me -- of
00:00:53.628 05 whether the Harz family and their counsel
00:00:56.178 06 cooperated in your investigation?
Ready
Page 4, Line 23, Score 100%
EB0124aWeb.mpg

- Move the next missing timecode by pressing the **[N]** key again, as shown below. Use the **[Spacebar]** to timestamp the line.


TimeCoder - [Barthel, Edwin (Vol. 01) - 01/24/2002 [Demonstration Excerpt]]
File Edit View Multimedia Tools Help
Navigation and Control HotKeys:
HOME ..... Move to beginning of transcript
END ..... Move to ending of transcript
PAGE UP ..... Move up one display page
PAGE DOWN ..... Move down one display page
UP ARROW ..... Move up one transcript line
DOWN ARROW ..... Move down one transcript line
LEFT ARROW ..... Seek multimedia back
RIGHT ARROW ..... Seek multimedia forward
ADD (+) ..... Increase playback speed
SUBTRACT (-) ..... Decrease playback speed
SPACEBAR ..... Place TimeCode on current line
DELETE ..... Remove TimeCode from line
PAUSE ..... Play/Pause multimedia stream
00:00:29:367
EB0124AWEB.MPG
TimeCoder
00:12:07.406 24 Q. So all you recall is their claim
00:12:09.316 25 generally?
00:12:10.916 00013: 01 A. Yes, sir.
02 Q. And some gas-station claims?
03 A. Yes, sir.
00:12:32.251 04 MR. ZAGON: Mr. Barthel, that is all I
00:12:33.985 05 have. So thank you for coming down.
00:12:36.275 06 THE WITNESS: You're welcome.
00:12:36.625 07 MR. ZAGON: I appreciate your time.
00:12:41.045 08 Let's see. If the court reporter would
00:12:43.938 09 please prepare the transcript and mail it to
00:12:47.239 10 Mr. Baratta's office, and they will supply it to
00:12:50.359 11 Mr. Barthel for him to read and sign and make
00:12:54.127 12 comments if he -- make changes if he chooses to.
13 Mr. Baratta will circulate the changes and
Stops the multimedia stream
Page 13, Line 2, Score 0%

- Repeat the process until all of the marked (red) lines have been timestamped.

Note: *The grey colored line indicates a non-spoken portion of the Digital Video Transcript. The transcript title, appearances, and certification areas will usually be marked as a grey line. These areas are automatically defined during import of the source transcript and do not need to be timecoded.*

Using Extrapolate Timecodes Function

TimeCoder has an Extrapolate Timecodes function that will automatically "fill" gaps between timecoded lines. This feature is handy for automatically populating missing timecodes. However, this feature should only be used when there are 1-2 line gaps between timecodes. Attempting to extrapolate a Digital Video Transcript with large blocks of un-timestamped lines will result in poor synchronization during playback.

More Information:

- TimeCoder

Exporting Transcripts

TimeCoder - Exporting a Digital Video Transcript

After a DVT has been synchronized by timecoding the transcript, it can be exported to a number of formats. Click the links below to learn more about each export format.

Topics:

- Export to a TrialDirector™ Case File (*.cms)
- Export an OpenDVT™ XML File (*.xml)
- Export TimeCoder™ Multimedia List File (*.tml)
- Export Transcript to ASCII Format(*.txt)
- Export Transcript to AMICUS Format(*.ami, *.trn)
- Export to LiveNote™ / VideoNote™ Format (*.pdf, *.vid)
- Export to Media Player Synchronized Media File (*.smi)
- Export To Sanction II™ Transcript Database (*.mdb)
- Export To CT Summation™ Briefcase format file (*.sbf)

More Information:

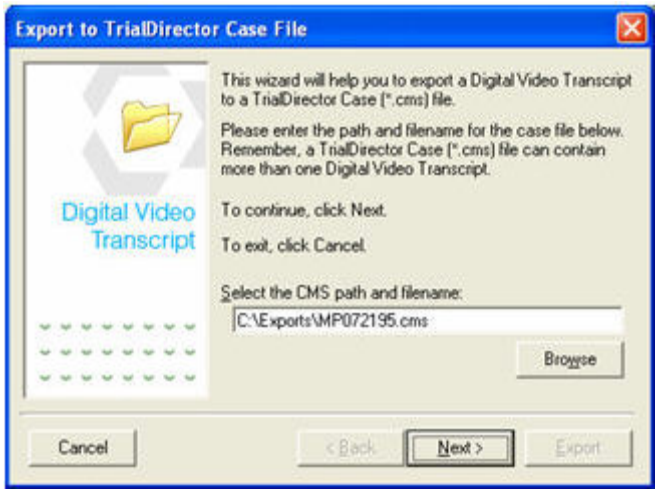
- TimeCoder

TimeCoder - Exporting to TrialDirector Case File

When a synchronized DVT is exported to a TrialDirector Case File, a Compound Media Storage (*.cms) file is created, which can be imported into TrialDirector.

Follow these steps to export a TrialDirector Case File:

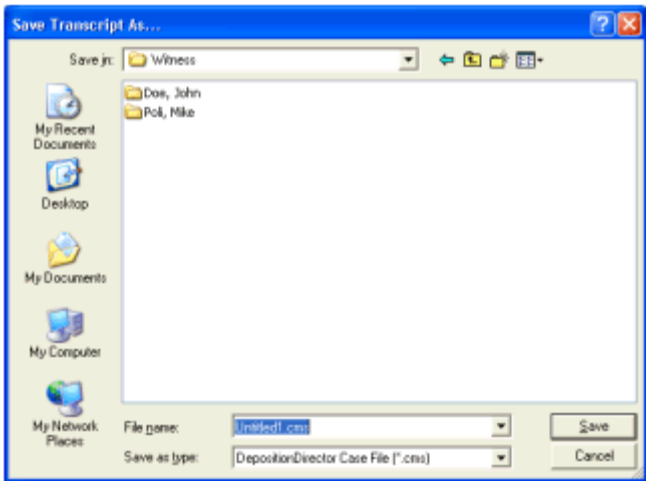
1. Open the DVT you want to export.
2. Select **Export to... | TrialDirector(TM) Case file (*.cms)** from the File menu. The following window appears:


Export to TrialDirector Case File
This wizard will help you to export a Digital Video Transcript to a TrialDirector Case (*.cms) file.
Please enter the path and filename for the case file below. Remember, a TrialDirector Case (*.cms) file can contain more than one Digital Video Transcript.
To continue, click Next.
To exit, click Cancel.
Digital Video Transcript
Select the CMS path and filename:
C:\Exports\MP072195.cms
Browse
Cancel
< Back
Next >
Export

Note: *At any time during the export, you may click* ***Back*** *to return to the previous export window or* ***Cancel*** *to cancel the export.*

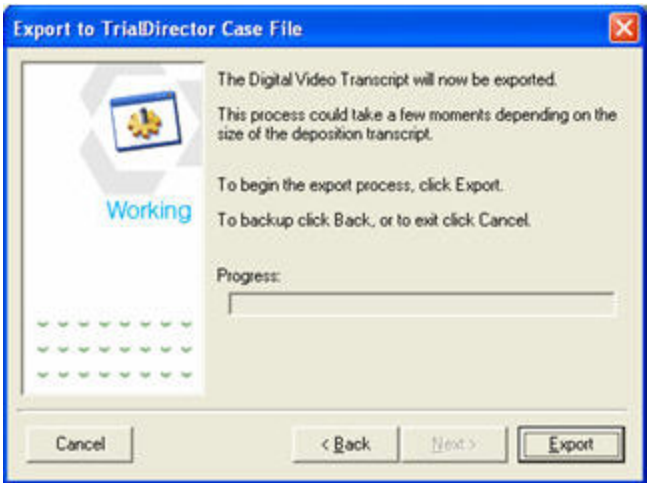
3. Enter a destination folder and filename for the *.cms, or click **Browse** to navigate to the desired folder and filename.

a. If you click **Browse**, the following window appears:

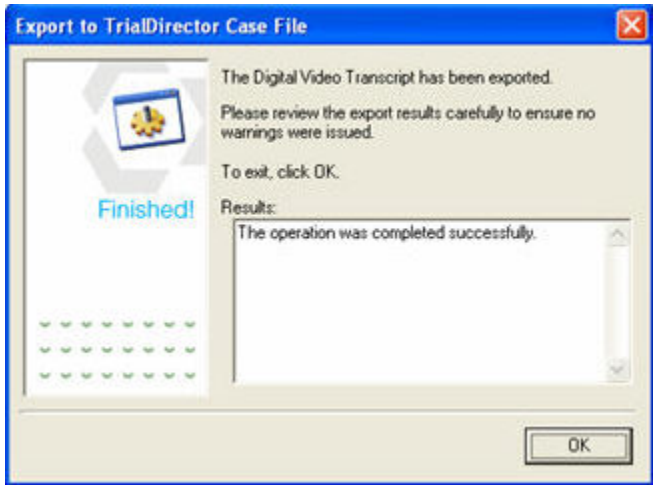


b. Select the desired destination folder and type a name for the *.cms file in the *File Name* field. Click **Save** to save the selection.

4. When the desired folder and filename are selected, click **Next**.


Export to TrialDirector Case File
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the DVT. When the progress bar reaches the end, the export is complete.


Export to TrialDirector Case File
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered. Click **OK** to exit the export process.

More Information:

- TimeCoder

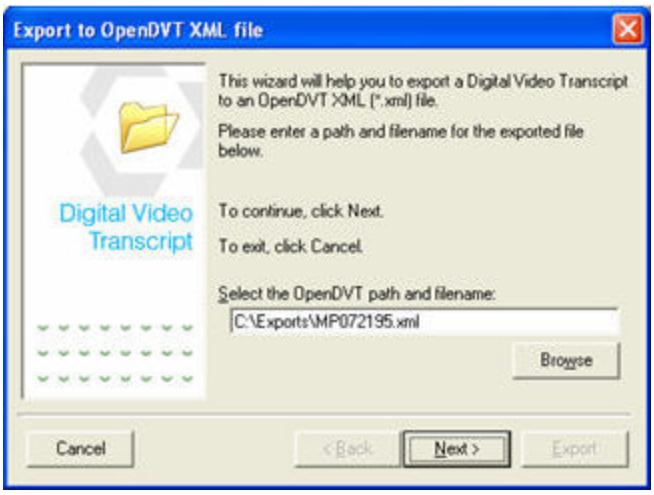
TimeCoder - Export to OpenDVT XML File

The OpenDVT XML file is an open file format for Digital Video Transcripts. This format was developed by inData, in conjunction with other software vendors, to provide a mechanism

for the seamless exchange of transcripts & synchronization information between applications.

Follow the steps below to export to an OpenDVT XML file.

1. Open the timecoded DVT.
2. Select **Export To... | OpenDVT(TM) XML File (*.xml)** from the File menu.

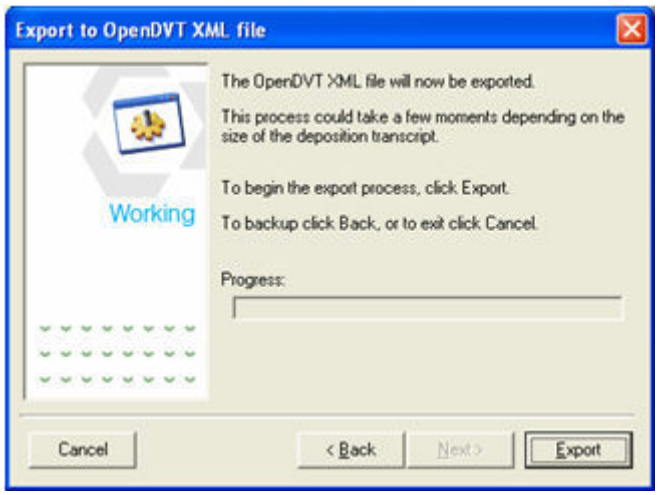

Export to OpenDVT XML file
This wizard will help you to export a Digital Video Transcript to an OpenDVT XML (*.xml) file.
Please enter a path and filename for the exported file below.
Digital Video Transcript
To continue, click Next.
To exit, click Cancel.
Select the OpenDVT path and filename:
C:\Exports\MP072195.xml
Browse
Cancel
< Back
Next >
Export

3. Enter a destination path and filename for the *.xml file, or click **Browse** to navigate to the desired path and filename.

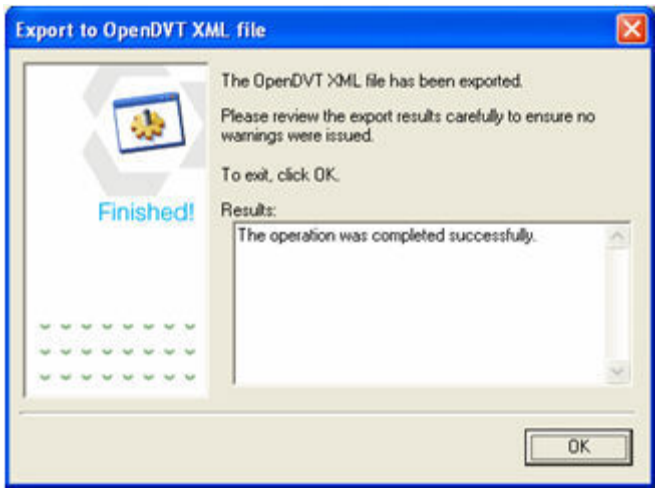
    a. If you click **Browse**, the following window appears:

    b. Select the desired destination folder and type a name for the *.xml file in the File Name field. Click **Save** to save the selection.

4. When the desired path and filename are selected, click **NEXT**.


Export to OpenDVT XML file
The OpenDVT XML file will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the OpenDVT XML file. When the progress bar reaches the end, the export is complete.


Export to OpenDVT XML file
The OpenDVT XML file has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered. Click **OK** to exit the export process.

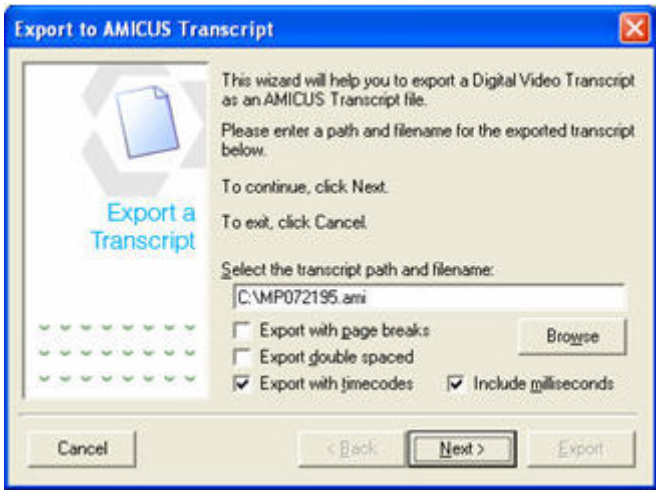
More Information:

- Export TrialDirector Case File
- TimeCoder

TimeCoder - Exporting to AMICUS Format

Any transcript may be exported to AMICUS (*.ami, *.trn) format. To determine which format is ideal for your purposes, consult the product manual for the application you plan to import the transcript into.

1. Open the DVT you want to export.
2. Select **Export to... AMICUS Transcript (*.ami, *.trn)** from the **File** menu.

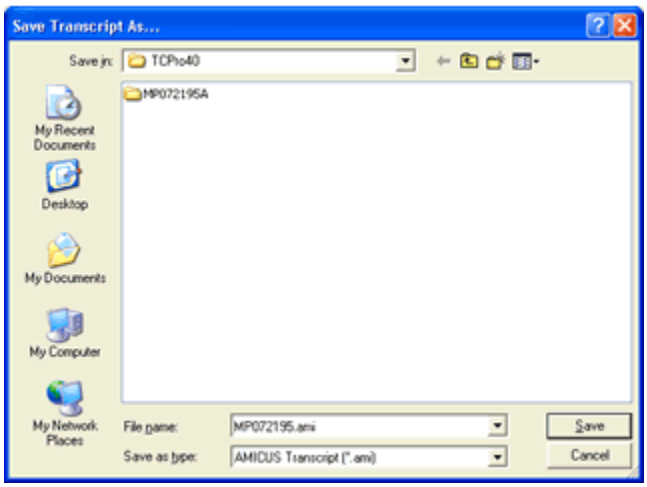

Export to AMICUS Transcript
This wizard will help you to export a Digital Video Transcript as an AMICUS Transcript file.
Please enter a path and filename for the exported transcript below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the transcript path and filename:
C:\MP072195.ami
Export with page breaks
Export double spaced
Export with timecodes
Include milliseconds
Browse
Cancel
< Back
Next >
Export

Note: *At any time during the export, you may click* ***Back*** *to return to the previous export window or* ***Cancel*** *to cancel the export.*

3. Set the export options as described below.

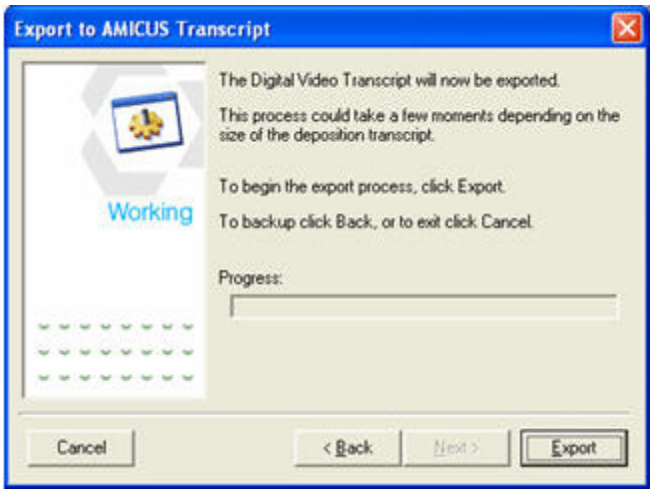
Export with Page Breaks	The exported transcript will contain page breaks.
Export Double Spaced	The exported transcript will be in double-spaced format.
Export with Timecodes	The timecodes that you placed in the transcript will be preserved in the exported transcript. This may be helpful when archiving your files.
Include Milliseconds	The timecodes in the exported transcript will include milliseconds, in addition to hours, minutes, and seconds. This option can only be selected if the "Export with Timecodes" option is also selected.

4. Enter a destination path and filename for the exported transcript or click **Browse** to navigate to the desired folder.
    a. If you click **Browse**, the following window appears:

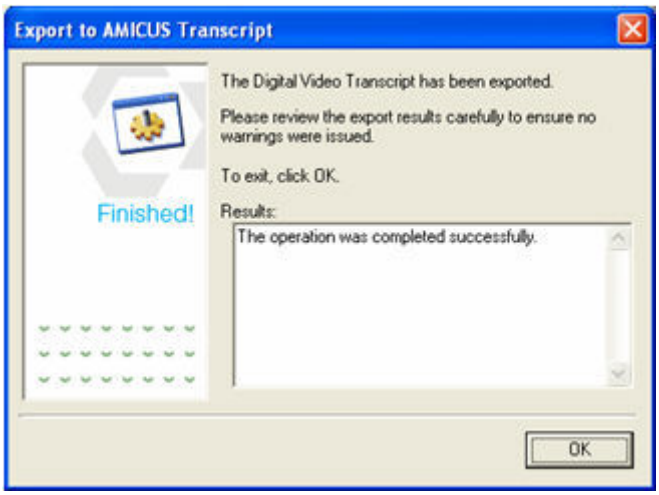


b. Select the desired destination folder and type a name for the *.ami or *.trn file in the *File Name* field. Click **Save** to save the selection.

5. When the desired folder and filename are selected, click **Next**.
6. Click **Export** to begin exporting the transcript. When the progress bar reaches the end, the export will be complete.


Export to AMICUS Transcript
Working
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Export

7. Review the export results to ensure that the operation was completed successfully.


Export to AMICUS Transcript
Finished!
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Results:
The operation was completed successfully.
OK

8. Click **OK** to exit the export process.

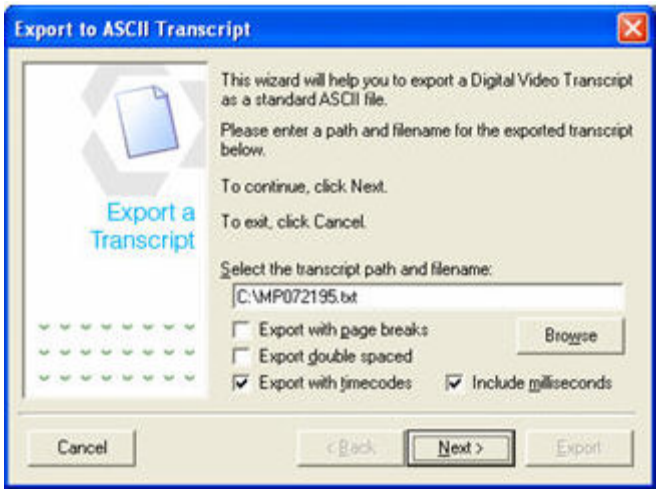
More Information:

- TimeCoder

TimeCoder - Exporting to ASCII Format

Any transcript may be exported to ASCII (*.txt) format. To determine which format is ideal for your purposes, consult the product manual for the application you plan to import the transcript into.

1. Open the DVT you want to export.
2. Select **Export to... | ASCII Transcript (*.txt)** from the **File** menu.

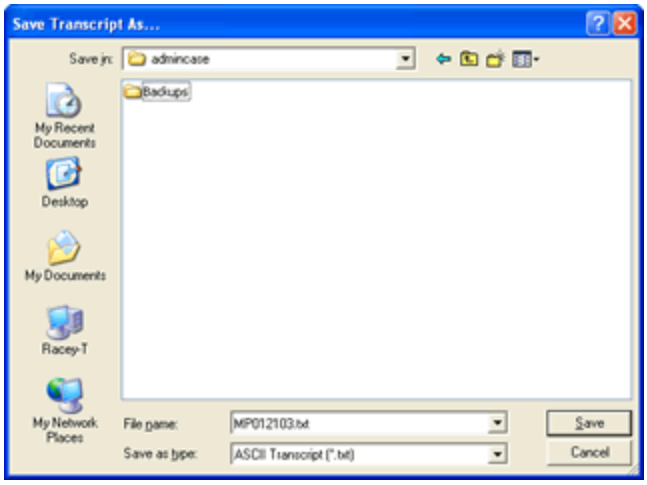

Export to ASCII Transcript
This wizard will help you to export a Digital Video Transcript as a standard ASCII file.
Please enter a path and filename for the exported transcript below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the transcript path and filename:
C:\MP072195.txt
Export with page breaks
Export double spaced
Export with timecodes
Include milliseconds
Browse
Cancel
< Back
Next >
Export

Note: *At any time during the export, you may click* ***Back*** *to return to the previous export window or* ***Cancel*** *to cancel the export.*

3. Set the export options as described below.

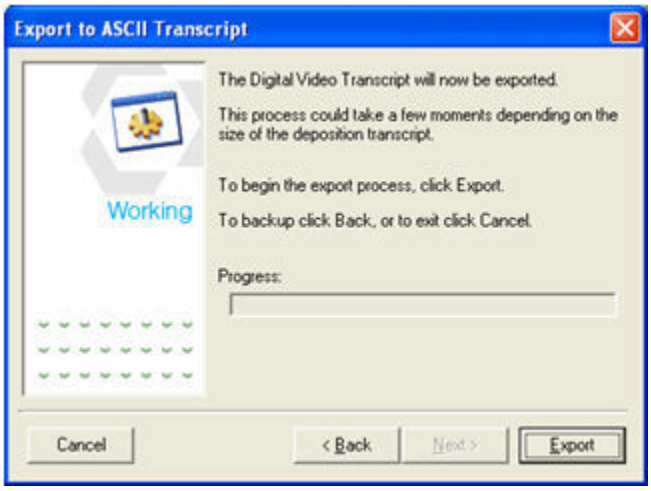
Export with Page Breaks	The exported transcript will contain page breaks.
Export Double Spaced	The exported transcript will be in double-spaced format.
Export with Timecodes	The timecodes that you placed in the transcript will be preserved in the exported transcript. This may be helpful when archiving your files.
Include Milliseconds	The timecodes in the exported transcript will include milliseconds, in addition to hours, minutes, and seconds. This option can only be selected if the "Export with Timecodes" option is also selected.

4. Enter a destination path and filename for the exported transcript or click **Browse** to navigate to the desired folder.
    a. If you click **Browse**, the following window appears:

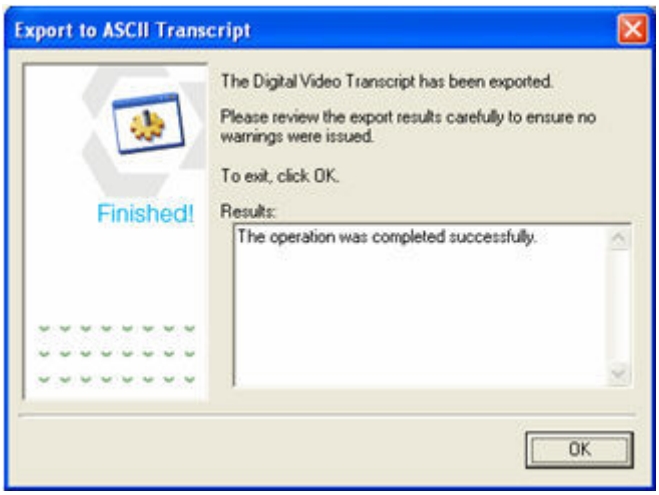


b. Select the desired destination folder and type a name for the *.txt file in the File Name field. Click **Save** to save the selection.

5. When the desired folder and filename are selected, click **Next**.
6. Click **Export** to begin exporting the transcript. When the progress bar reaches the end, the export will be complete.


Export to ASCII Transcript
Working
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Export

7. Review the export results to ensure that the operation was completed successfully.


Export to ASCII Transcript
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

8. Click **OK** to exit the export process.

More Information:

- TimeCoder

TimeCoder - Export to LiveNote / VideoNote Format

When a synchronized DVT is exported to the LiveNote / VideoNote format, it can then be imported into LiveNote or VideoNote.

Follow these steps to export LiveNote (.PTF) and VideoNote (.VID) files:

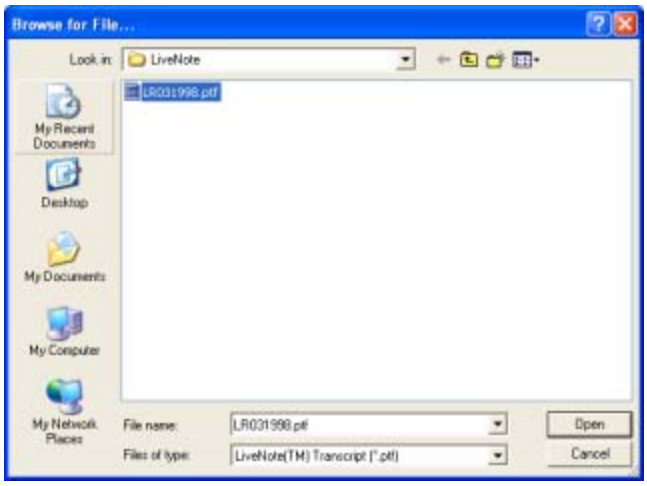
1. Open the timecoded DVT
2. Select **Export to... | LiveNote / VideoNote files (*.ptf)(*.vid)** from the File menu. The following window appears:

Export to LiveNote(TM) / VideoNote(TM) files
This wizard will help you to export a Digital Video Transcript to LiveNote(TM) / VideoNote(TM) files.
Please enter a path and filename for the exported transcript below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the transcript path and filename:
C:\Exports\MP072195.ptf
Browse
Cancel
< Back
Next >
Export

3. Enter a destination path and filename for the *.ptf or *.vid file, or click [Browse] to navigate to the desired path and filename.

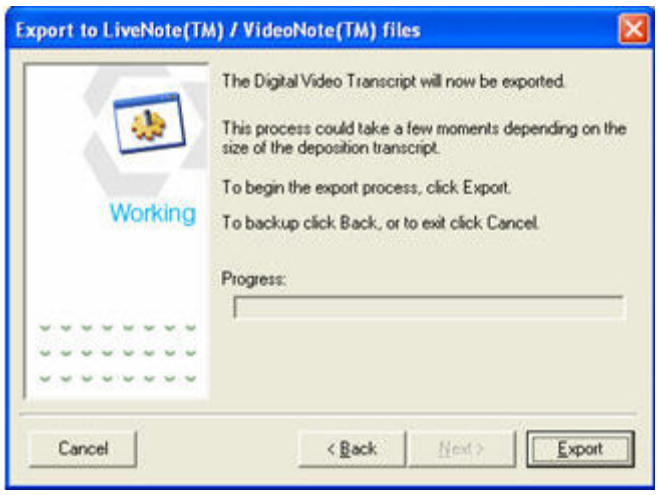
Note: *If the *.ptf and *.vid files reside in the same directory, selecting the *.ptf will select the associated *.vid file, as well.*

a. If you click **Browse**, the following window appears:



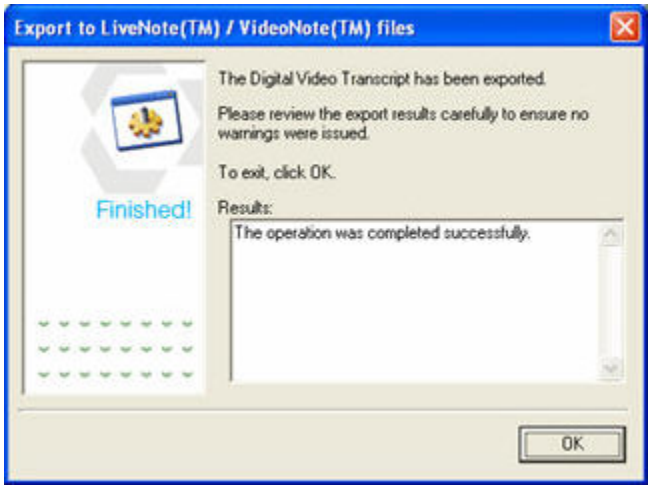
b. Select the desired destination folder and *.ptf file. Click **Open**. The following window appears:

4. When the desired folder and filename are selected, click **Next**.


Export to LiveNote(TM) / VideoNote(TM) files
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

3.

5. Click **Export** to begin exporting the DVT to LiveNote / VideoNote files. When the progress bar reaches the end, the export is complete.


Export to LiveNote(TM) / VideoNote(TM) files
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered.
7. Click **OK** to exit the export process.

More Information:

- Import LiveNote / VideoNote Files

TimeCoder - Export to Media Player Synchronized Media Interchange

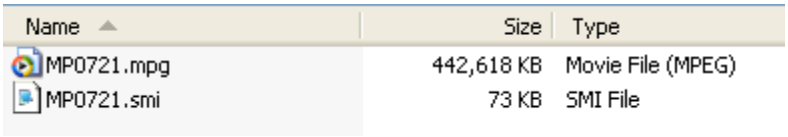
Topics:

- About Synchronized Media Interchange Files
- Export DVT to Synchronized Media Interchange File

About Synchronized Media Interchange Files

TimeCoder has a transcript export option that will create *.smi files for use with Windows Media Player™. The Synchronized Media Interchange (*.smi) file contains the timecoded Digital Video Transcript, specially formatted for use as synchronized captions within Windows Media Player™. Utilizing the *.smi file format allows a Windows Media Player user to view synchronized transcript text.

When the *.smi file resides next to the source multimedia file (ex. *.mpg) within the same folder, as shown below, Media Player will be able to use the synchronized transcript text.



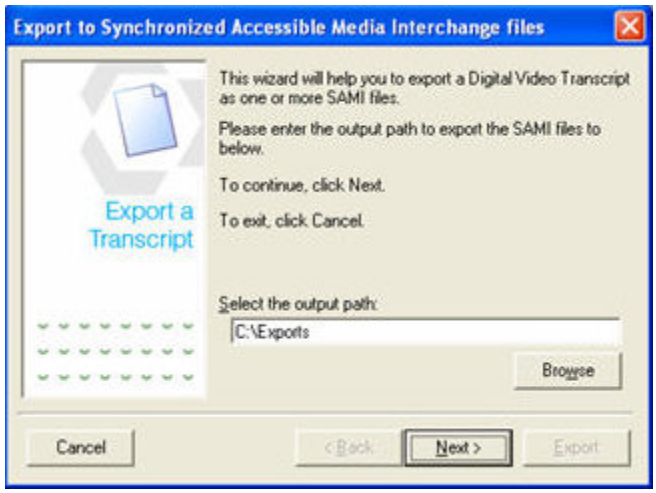
Enabling the **Captions** option within Media Player will allow any corresponding *.smi file to be used for text synchronization. The example below demonstrates Media Player displaying a text caption from a *.smi file exported from TimeCoder.

Note: *Please reference the Windows Media Player help for instructions on enabling the* ***Captions*** *option. The method to enable* ***Captions*** *depends on the version of Windows Media Player.*

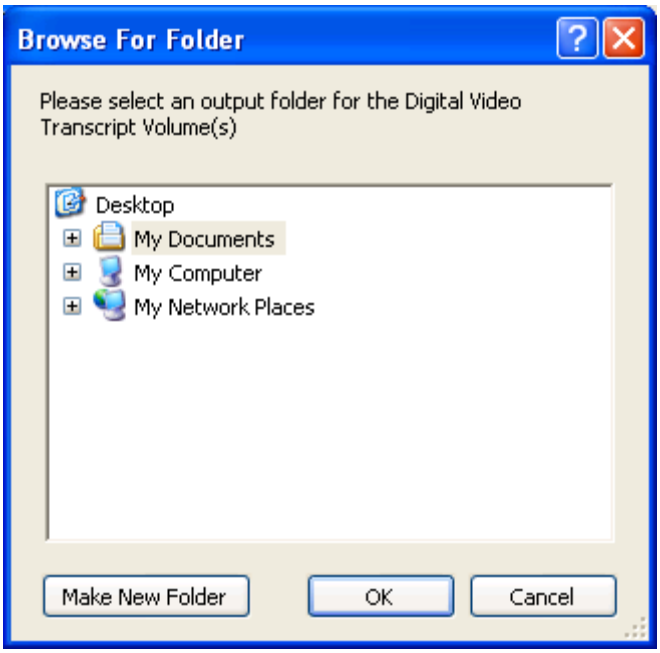
Exporting Digital Video Transcript to *.SMI File

Follow these steps to export a Digital Video Transcript to a *.smi file:

1. Open the timecoded DVT
2. Select **Export To... | Media Player Synchronized Accessible Media Interchange Files (*.smi)** from the File menu.

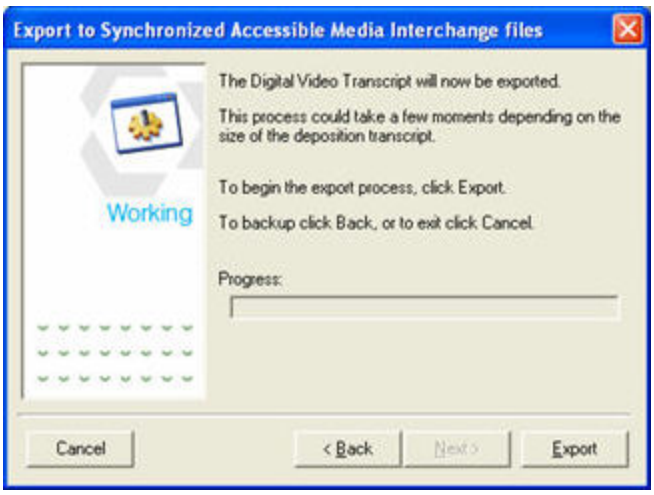

Export to Synchronized Accessible Media Interchange files
This wizard will help you to export a Digital Video Transcript as one or more SAMI files.
Please enter the output path to export the SAMI files to below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the output path:
C:\Exports
Browse
Cancel
< Back
Next >
Export

3. Enter a destination path and filename for the .SMI file, or click **Browse** to navigate to the desired path and filename.
    a. If you click **Browse**, the following window appears:

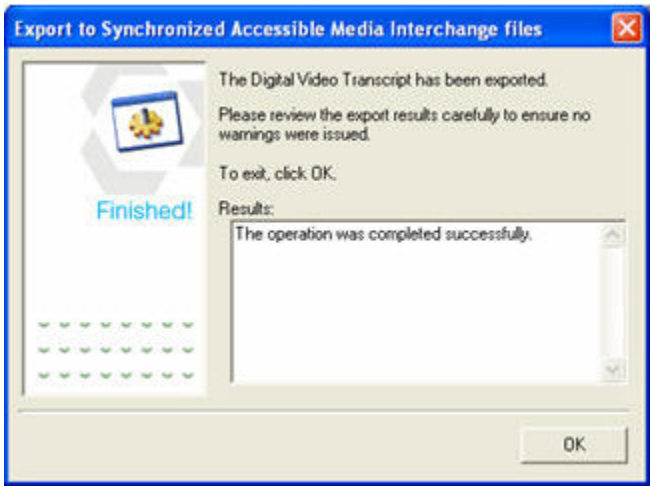


    b. Select the desired output folder for the .SMI file from the Browse For Folder dialog. Click **OK** to save the selection or **Cancel** to cancel the selection and return to the **Export To... | Media Player Synchronized Accessible Media Interchange Files (*.smi)** window.

5. When the desired path and filename are selected, click **Next**. The following window appears:


Export to Synchronized Accessible Media Interchange files
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the *.smi file. When the progress bar reaches the end, the export results are displayed, as shown below.


Export to Synchronized Accessible Media Interchange files
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

5. Review the export results carefully to ensure that no errors were encountered. Click **OK** to exit the export process.

More Information:

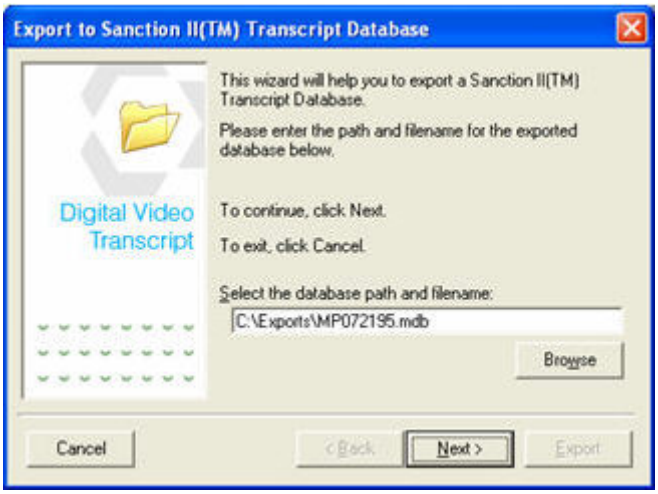
- Export TrialDirector Case File
- TimeCoder

Exporting to a Sanction II™ Transcript Database (*.mdb)

When a synchronized DVT is exported to the Sanction format, it can then be imported into Sanction II.

To export Sanction II (*.mdb) files,

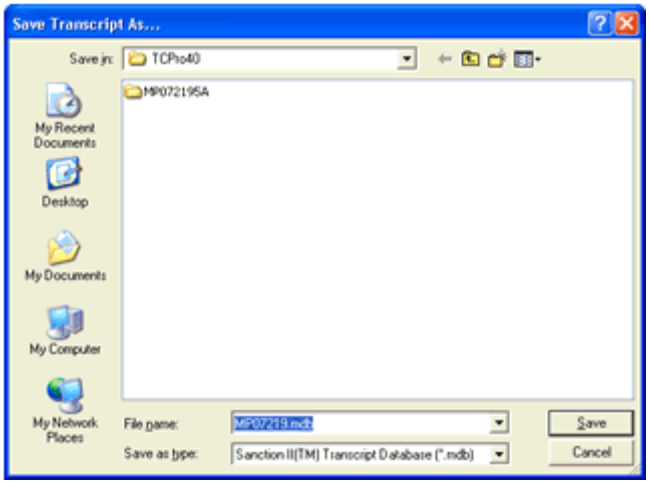
1. Open a Digital Video Transcript.
2. Select **Export to... | Sanction II(TM) Transcript Database (*.mdb)** from the **File** menu.


Export to Sanction II(TM) Transcript Database
This wizard will help you to export a Sanction II(TM) Transcript Database.
Please enter the path and filename for the exported database below.
Digital Video Transcript
To continue, click Next.
To exit, click Cancel.
Select the database path and filename:
C:\Exports\MP072195.mdb
Browse
Cancel
< Back
Next >
Export

Note: *At any time during the export, you may click* ***Back*** *to return to the previous export window or* ***Cancel*** *to cancel the export.*

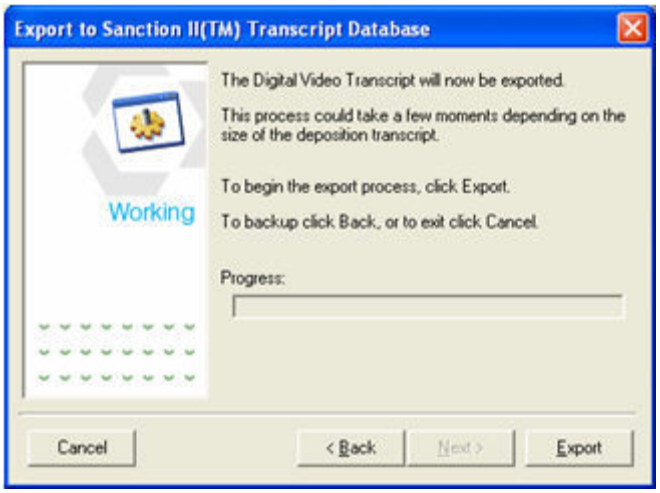
3. Enter a destination path and filename for the *.mdb file, or click **Browse** to navigate to the desired path and filename.

a. If you click **Browse**, the following window appears:

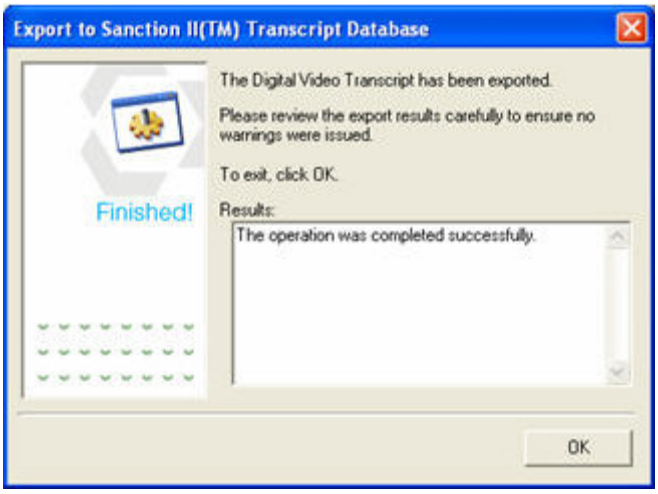


2. Select the desired destination folder and type a name for the *.mdb file in the *File Name* field. Click **Save** to save the selection.

4. When the desired folder and filename are selected, click **Next**.


Export to Sanction II(TM) Transcript Database
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the DVT to Sanction files. When the progress bar reaches the end, the export is complete.


Export to Sanction II(TM) Transcript Database
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered.
7. Click **OK** to exit the export process.

More Information:

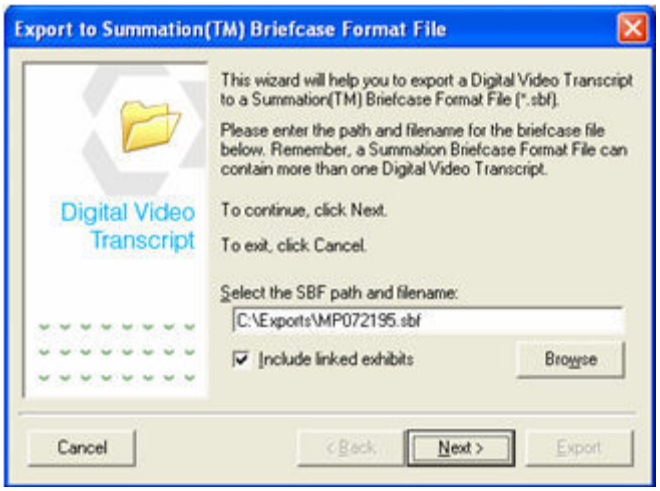
- **Timecoding**

Exporting to a CT Summation™ Briefcase Format File (*.sbf)

When a synchronized DVT is exported to the CT Summation Briefcase Format File format, it can then be imported into CT Summation Enterprise or iBlaze.

To export CT Summation Briefcase Format (*.sbf) files:

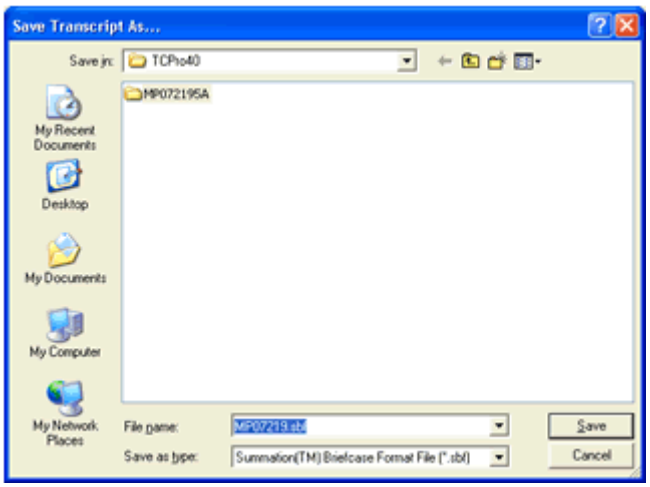
1. Open a Digital Video Transcript.
2. Select **Export to... | Summation(TM) Briefcase Format File (*.sbf)** from the **File** menu.


Export to Summation(TM) Briefcase Format File
This wizard will help you to export a Digital Video Transcript to a Summation(TM) Briefcase Format File (*.sbf).
Please enter the path and filename for the briefcase file below. Remember, a Summation Briefcase Format File can contain more than one Digital Video Transcript.
Digital Video Transcript
To continue, click Next.
To exit, click Cancel.
Select the SBF path and filename:
C:\Exports\MP072195.sbf
Include linked exhibits
Browse
Cancel
< Back
Next >
Export

Note: *At any time during the export, you may click* ***Back*** *to return to the previous export window or* ***Cancel*** *to cancel the export.*

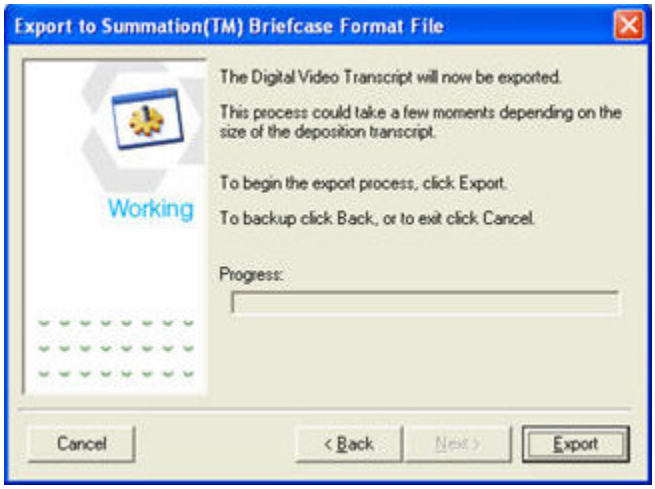
3. Enter a destination path and filename for the .sbf file, or click **Browse** to navigate to the desired folder and filename.

a. If you click **Browse**, the following window appears:

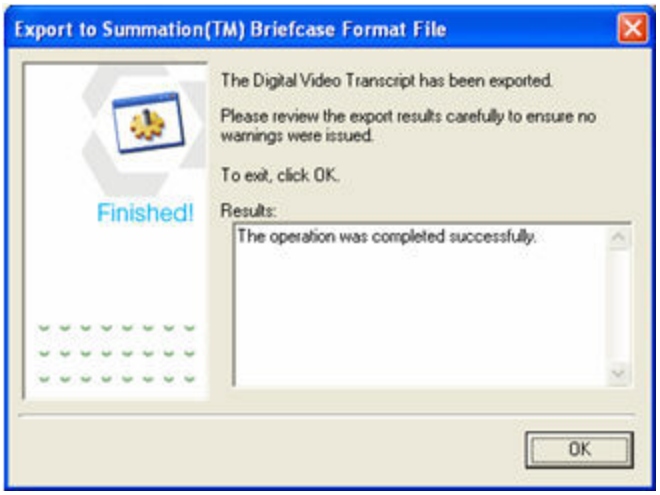


2. Select the desired destination folder and type a name for the .sbf file in the *File Name* field. Click **Save** to save the selection.

4. When the desired folder and filename are selected, click **Next**.


Export to Summation(TM) Briefcase Format File
Working
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the DVT to Summation files. When the progress bar reaches the end, the export is complete.


Export to Summation(TM) Briefcase Format File
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered. Click **OK** to exit the export process.

More Information:

- **Timecoding**

TimeCoder - Export to TimeCoder Multimedia List File

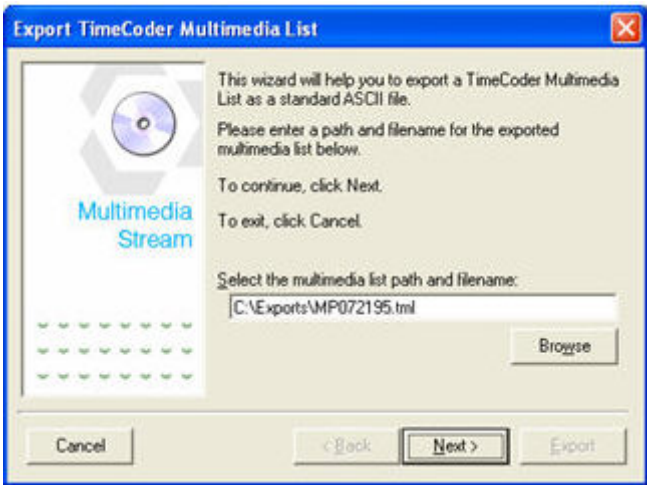
The TimeCoder Multimedia List file is a comma-delimited text file that details information about each Multimedia Resource file that is part of the Digital Video Transcript. Exporting the TimeCoder Multimedia List file is a handy way to backup information about the multimedia files associated with a timecoded transcript.

The TimeCoder Multimedia List file can be used in place of the audio/video files when preserving transcript timecodes during the DVT creation process.

The TimeCoder Multimedia List file can be used by 3rd party applications (along with a timecoded transcript) that need to import data from TimeCoder.

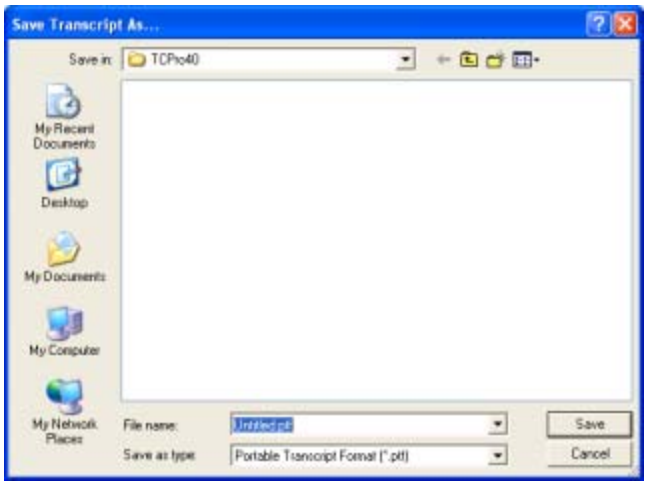
Follow these steps to export a TimeCoder Multimedia List file:

1. Open the timecoded DVT.
2. Select **Export To... | TimeCoder Multimedia List (*.tml)** from the File menu.


Export TimeCoder Multimedia List
This wizard will help you to export a TimeCoder Multimedia List as a standard ASCII file.
Please enter a path and filename for the exported multimedia list below.
To continue, click Next.
To exit, click Cancel.
Multimedia Stream
Select the multimedia list path and filename:
C:\Exports\MP072195.tml
Browse
Cancel
< Back
Next >
Export

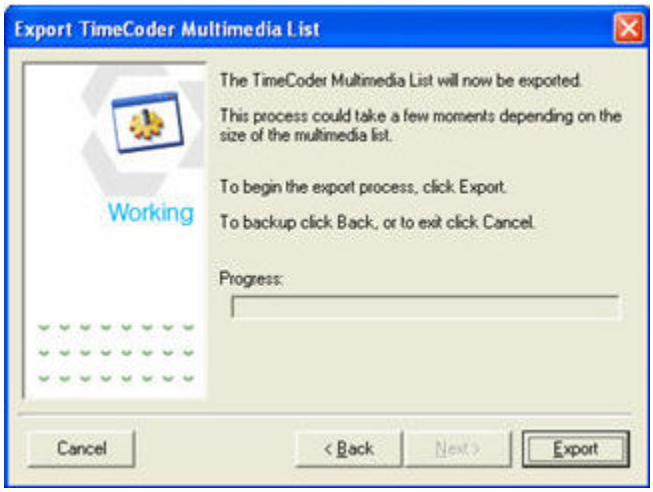
3. Enter a destination path and filename for the .TML file, or click **Browse** to navigate to the desired path and filename.

    a. If you click **Browse**, the following window appears:

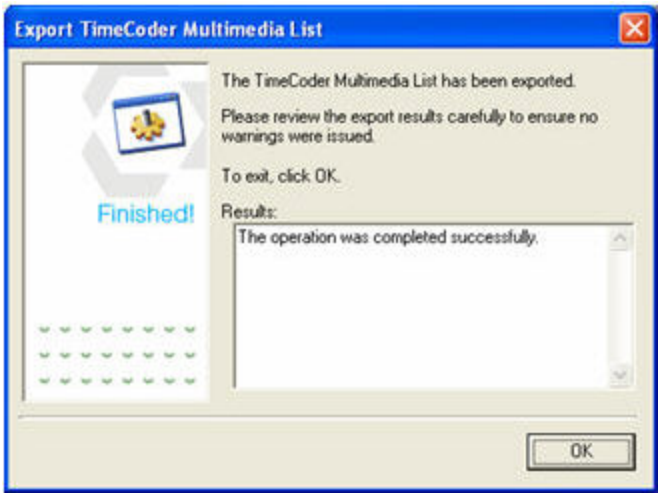


    2. Select the desired destination folder and type a name for the .TML file in the File Name field. Click Save to save the selection.

4. When the desired path and filename are selected, click **Next.**


Export TimeCoder Multimedia List
The TimeCoder Multimedia List will now be exported.
This process could take a few moments depending on the size of the multimedia list.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the TimeCoder Multimedia List file. When the progress bar reaches the end, the export is complete.


Export TimeCoder Multimedia List
The TimeCoder Multimedia List has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered. Click **OK** to exit the export process.

More Information:

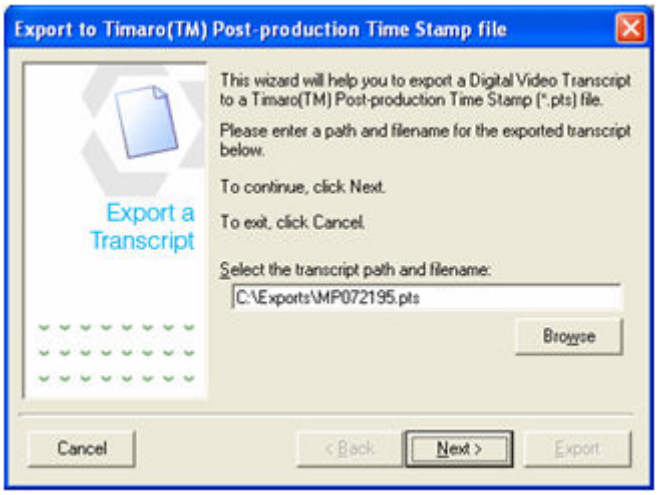
- Export TrialDirector Case File
- TimeCoder

Exporting to a Timaro™ Post-Production Timestamp File

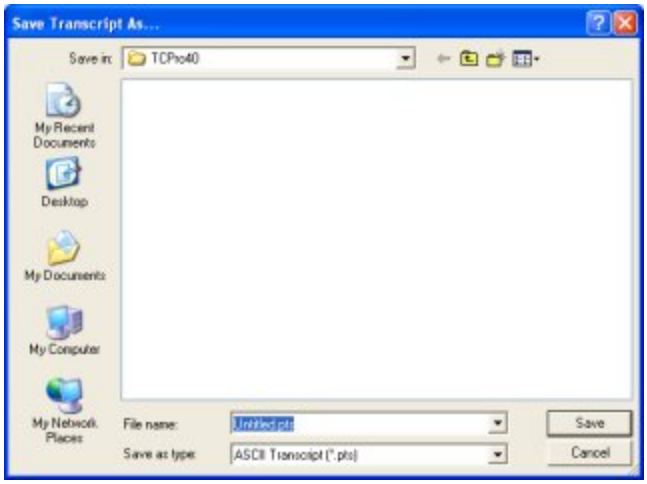
TimeCoder can export a Digital Video Transcript to the Timaro™ (*.pts) file format.

To export to a Post-production Time Stamp (*.pts) file,

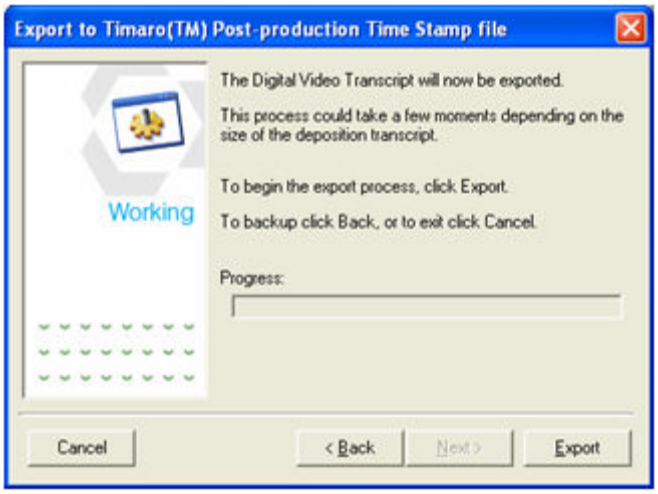
1. Open a Digital Video Transcript.
2. Select **Export to... | Timaro(TM) Post-production Time Stamp file (*.pts)** from the **File** menu.


Export to Timaro(TM) Post-production Time Stamp file
This wizard will help you to export a Digital Video Transcript to a Timaro(TM) Post-production Time Stamp (*.pts) file.
Please enter a path and filename for the exported transcript below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the transcript path and filename:
C:\Exports\MP072195.pts
Browse
Cancel
< Back
Next >
Export

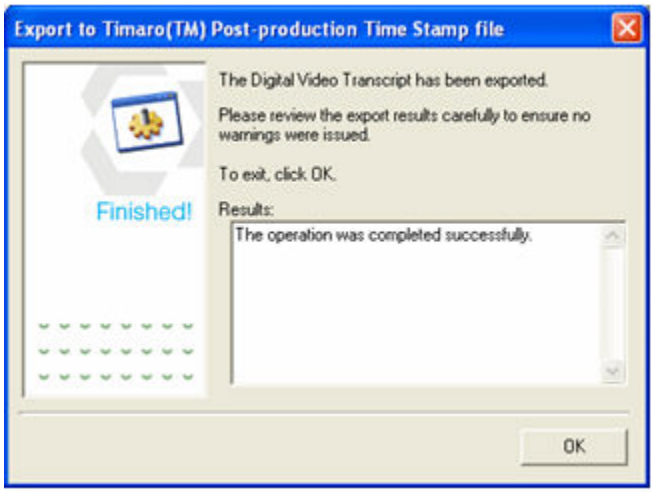
3. Enter a destination path and filename for the *.pts file, or click **Browse** to navigate to the desired path and filename.
    a. If you click **Browse**, the following window appears:



    b. Select the desired destination folder and type a name for the *.pts file in the *File Name* field. Click **Save** to save the selection.
4. When the desired path and filename are selected, click **Next**. The following window appears:


Export to Timaro(TM) Post-production Time Stamp file
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the Post-production Timestamp file. When the progress bar reaches the end, the export is complete.


Export to Timaro(TM) Post-production Time Stamp file
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered.
7. Click **OK** to exit the export process.

More Information:

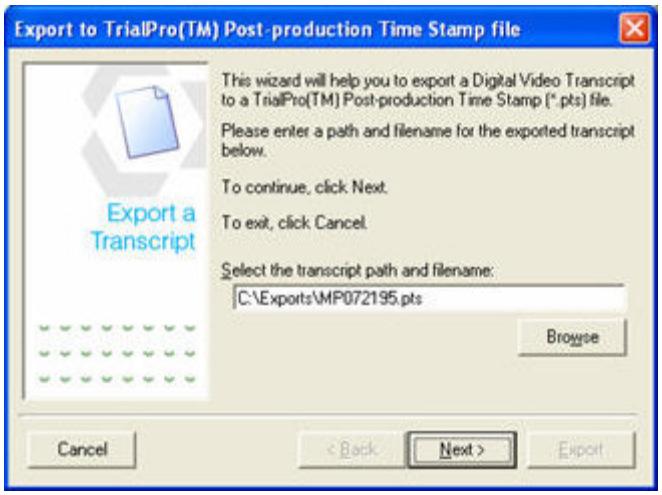
- **Timecoding**

Exporting to a TrialPro™ Post-Production Timestamp File

TimeCoder can export a Digital Video Transcript to the TrialPro™ (*.pts) file format.

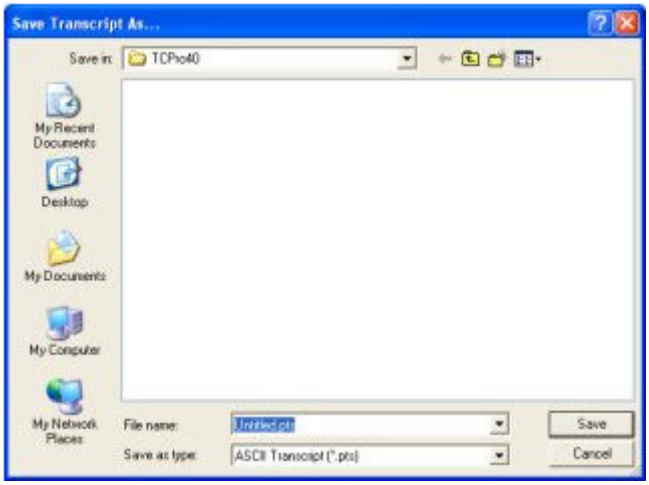
To export to a Post Production Timestamp (.pts) file,

1. Open a Digital Video Transcript.
2. Select **Export to... | Trialpro(TM) Post-Production Time Stamp file (*.pts)** from the **File** menu.


Export to TrialPro(TM) Post-production Time Stamp file
This wizard will help you to export a Digital Video Transcript to a TrialPro(TM) Post-production Time Stamp (*.pts) file.
Please enter a path and filename for the exported transcript below.
To continue, click Next.
To exit, click Cancel.
Export a Transcript
Select the transcript path and filename:
C:\Exports\MP072195.pts
Browse
Cancel
< Back
Next >
Export

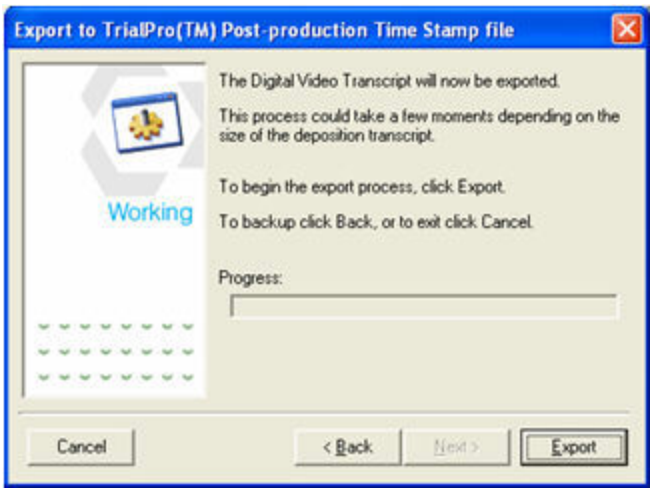
3. Enter a destination folder and filename for the *.pts file, or click **Browse** to navigate to the desired path and filename.

a. If you click **Browse**, the following window appears:

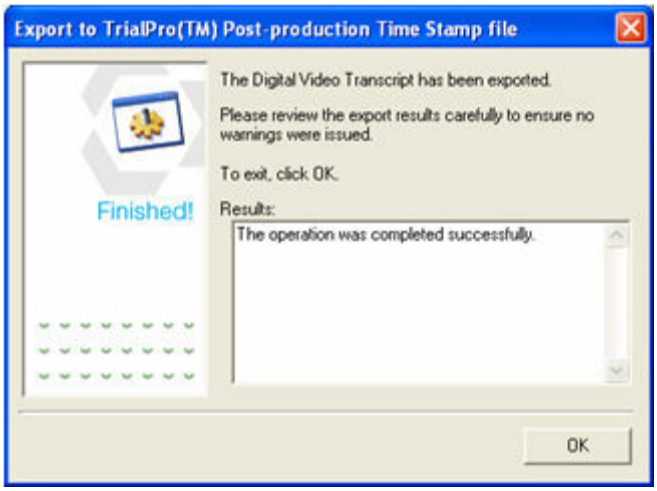


b. Select the desired destination folder and type a name for the *.pts file in the *File Name* field. Click **Save** to save the selection.

4. When the desired path and filename are selected, click **Next**.


Export to TrialPro(TM) Post-production Time Stamp file
The Digital Video Transcript will now be exported.
This process could take a few moments depending on the size of the deposition transcript.
To begin the export process, click Export.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Export

5. Click **Export** to begin exporting the Post-production Timestamp file. When the progress bar reaches the end, the export is complete.


Export to TrialPro(TM) Post-production Time Stamp file
The Digital Video Transcript has been exported.
Please review the export results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

6. Review the export results carefully to ensure that no errors were encountered.
7. Click **OK** to exit the export process.

More Information:

- **Timecoding**

Importing Transcripts

TimeCoder - Importing a Digital Video Transcript

Topics:

- Import TrialDirector™ Case File (*.cms)
- Import LiveNote™ / VideoNote™ File (*.ptf, *.vid)
- Import RealLegal™ E*Transcript™ Files (*.ptx)
- Import Sanction II™ Transcript Database (*.mdb)
- Import Timaro™ Post-production Time Stamp File (*.pts)
- Import TrialPro™ Post-production Time Stamp File (*.pts)
- Import YesEdit™ CD-ROM with Sanction™ Transcript Database (*.mdb)

After a transcript has been synchronized using either the TimeCoder application or a third party program, it can then be imported back into TimeCoder.

The TimeCoder import features are especially useful for converting one timestamp file format to another. For example, a Sanction II™ transcript database (*.mdb) can be converted to a TrialDirector Case File (*.cms) via the TimeCoder import/export features.

More Information:

- TimeCoder

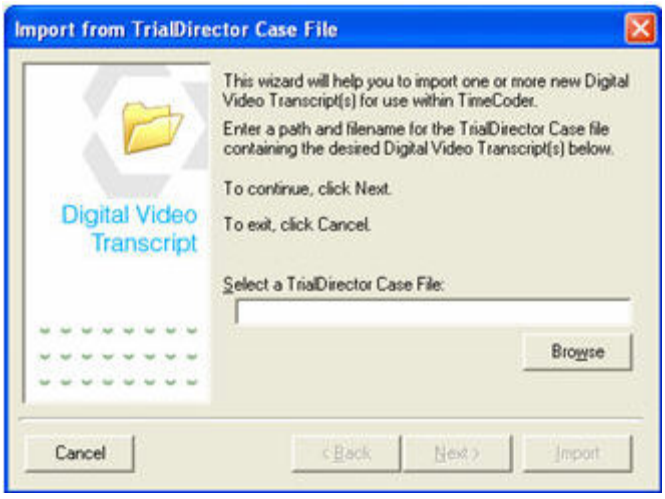
TimeCoder - Importing a TrialDirector Case File

TimeCoder can import existing *.cms files that may have been created in previous versions of TimeCoder, TrialDirector or DVTWizard. TimeCoder users may want to import legacy *.cms files to correct timecodes, add/remove multimedia resource files, adjust timecodes etc. After the *.cms file is imported into TimeCoder, it can even be exported to other formats.

When a synchronized transcript is contained within a TrialDirector Case, we will need to import the corresponding *.cms file.

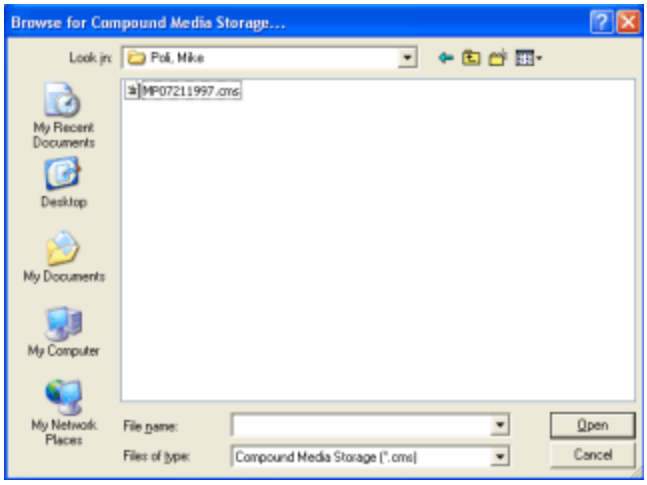
Follow these steps to import from a TrialDirector Case:

1. Select **Import from... | TrialDirector™ Case file (*.cms)** from the File menu.


Import from TrialDirector Case File
This wizard will help you to import one or more new Digital Video Transcript(s) for use within TimeCoder.
Enter a path and filename for the TrialDirector Case file containing the desired Digital Video Transcript(s) below.
To continue, click Next.
To exit, click Cancel.
Digital Video Transcript
Select a TrialDirector Case File:
Browse
Cancel
< Back
Next >
Import

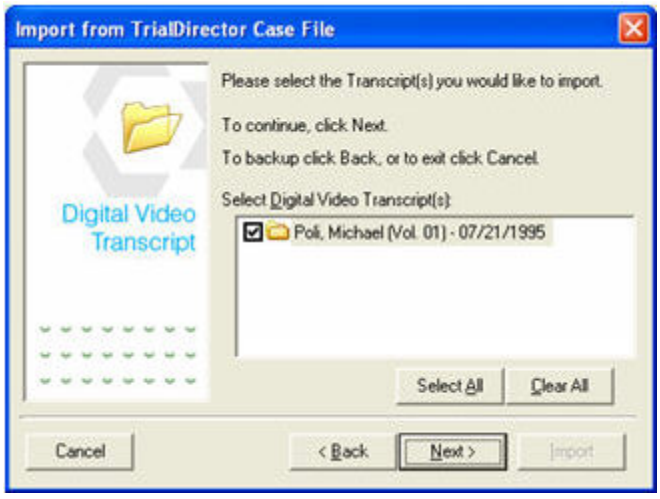
2. Enter a destination path and filename for the *cms file, or click **Browse** to navigate to the desired path and filename.

   a. If you click **Browse**, the following window appears:

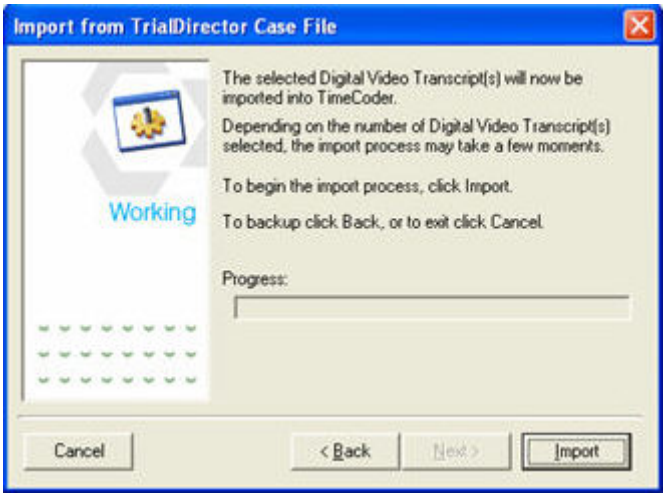


   b. Select the desired destination folder and *.cms file. Click **Open**.

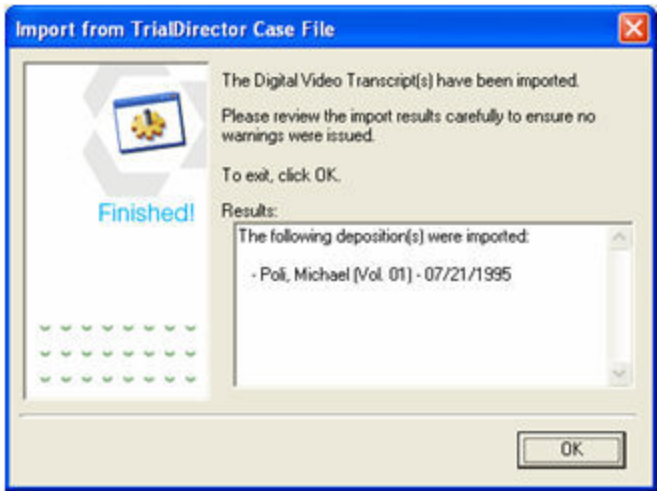
3. When the desired path and filename are selected, click **Next**. The following window appears:


Import from TrialDirector Case File
Please select the Transcript(s) you would like to import.
To continue, click Next.
To backup click Back, or to exit click Cancel.
Digital Video Transcript
Select Digital Video Transcript(s):
Poli, Michael (Vol. 01) - 07/21/1995
Select All
Clear All
Cancel
< Back
Next >
Import

4. Select the Digital Video Transcript(s) you would like to import into the current case. Click **Select All** to import all Digital Video Transcripts or **Clear All** to clear all selections. Click **Next** to continue.


Import from TrialDirector Case File
The selected Digital Video Transcript(s) will now be imported into TimeCoder.
Depending on the number of Digital Video Transcript(s) selected, the import process may take a few moments.
To begin the import process, click Import.
To backup click Back, or to exit click Cancel.
Working
Progress:
Cancel
< Back
Next >
Import

5. Click **Import** to continue the import process.


Import from TrialDirector Case File
The Digital Video Transcript(s) have been imported.
Please review the import results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The following deposition(s) were imported:
- Poli, Michael (Vol. 01) - 07/21/1995
OK

6. Verify that there are no warnings that were issued. Then select **OK** to complete the import process. You will then need to open the Digital Video Transcript that you imported.

More Information:

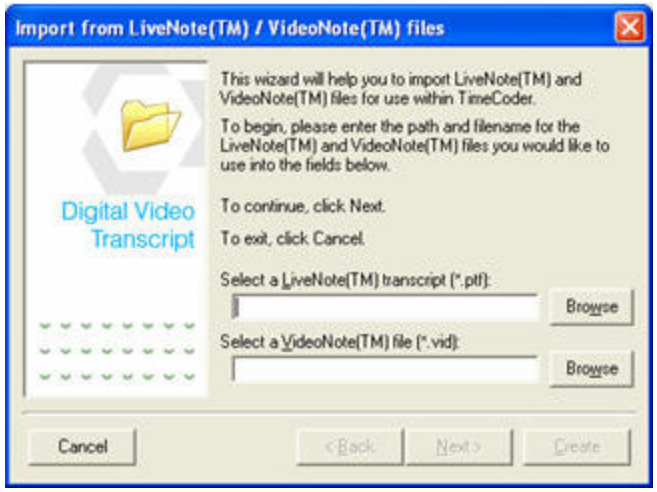
- Importing Digital Video Transcripts

TimeCoder - Importing LiveNote™ / VideoNote™ Files

When a synchronized transcript is imported from a LiveNote™ / VideoNote™ file, you will need to import the *.ptf / *.vid files that were created from the original application.

To import files from LiveNote / VideoNote:

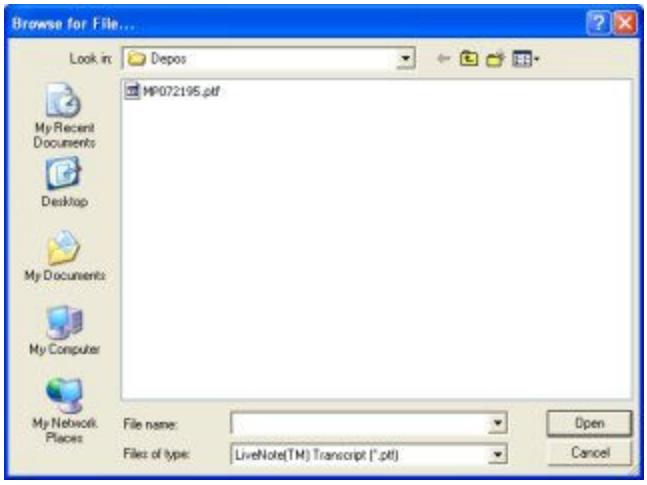
1. Select **Import from... | LiveNote™ / VideoNote™ files (*.ptf) (*.vid)** from the **File** menu.


Import from LiveNote(TM) / VideoNote(TM) files
This wizard will help you to import LiveNote(TM) and VideoNote(TM) files for use within TimeCoder.
To begin, please enter the path and filename for the LiveNote(TM) and VideoNote(TM) files you would like to use into the fields below.
To continue, click Next.
To exit, click Cancel.
Digital Video Transcript
Select a LiveNote(TM) transcript (*.ptf):
Browse
Select a VideoNote(TM) file (*.vid):
Browse
Cancel
< Back
Next >
Create

2. Enter a destination path and filename for the *.PTF file, or click **Browse** to navigate to the desired folder and filename.

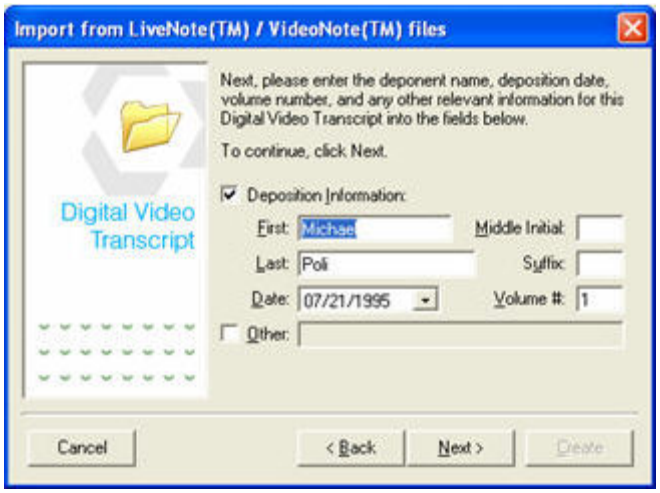
Note: *If the *.PTF and *.VID files reside in the same directory, selecting the *.PTF will select the associated *.VID file, as well.*

   a. If you click **Browse** the following window appears:



b. Select the desired destination folder and *.PTF file and click **Open**.

3. When the desired folder and filename are selected, click **Next**.

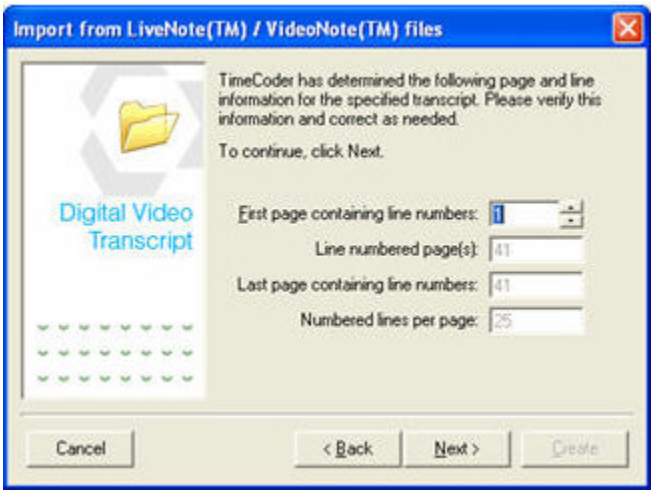


4. Enter the information for the deponent.

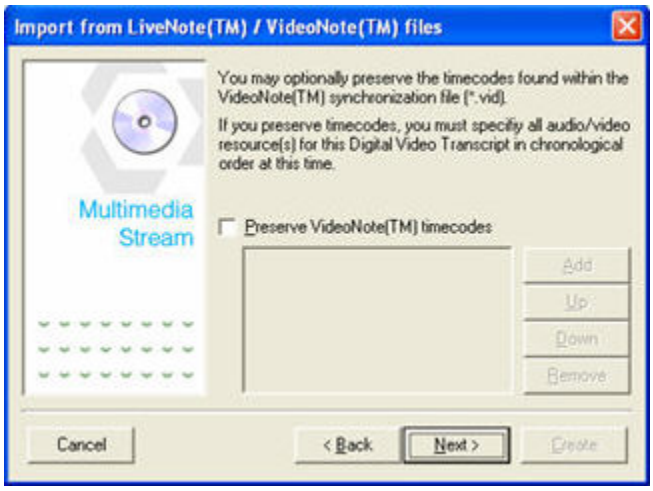
First Name	Deponent's first name
Middle Initial	Deponent's middle initial
Last Name	Deponent's last name
Suffix	Suffix appended to deponent's name. Examples: Jr., Sr., Esq.
Date	Deposition date
Volume #	Deposition volume number
Other	Additional information

The Deposition Information and Other Information can be enabled or disabled by checking or removing the checkmark from their respective boxes; however, both cannot be disabled at the same time. If you choose to enable the Deposition Information, the FIRST, LAST, DATE and VOLUME # fields must be filled in. If you choose to enable the Other Information, the OTHER field must be filled in.

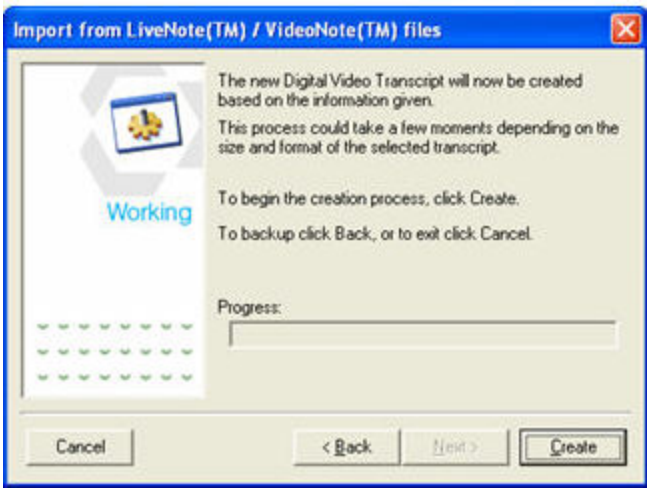
5. When you are finished entering information into the fields, click **Next**.


Import from LiveNote(TM) / VideoNote(TM) files
TimeCoder has determined the following page and line information for the specified transcript. Please verify this information and correct as needed.
To continue, click Next.
Digital Video Transcript
First page containing line numbers:
1
Line numbered page(s):
41
Last page containing line numbers:
41
Numbered lines per page:
25
Cancel
< Back
Next >
Create

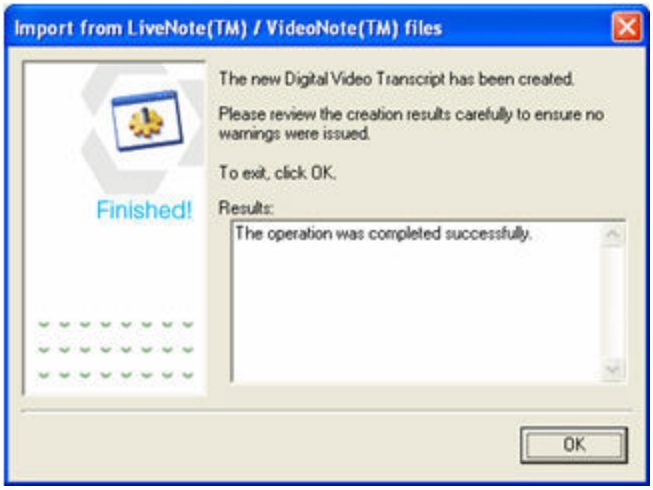
6. If the first page of the transcript that contains line numbers is a page other than one, enter the correct page number or use the small arrow buttons to select the correct page number.
7. Click **Next** to continue.


Import from LiveNote(TM) / VideoNote(TM) files
You may optionally preserve the timecodes found within the VideoNote(TM) synchronization file (*.vid).
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve VideoNote(TM) timecodes
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

8. If you would like to preserve VideoNote™ timecodes, you must specify all multimedia resources associated with the VideoNote (*.vid) file in chronological order. Click here for instructions on preserving timecodes.
9. Click **Next** to continue.


Import from LiveNote(TM) / VideoNote(TM) files
The new Digital Video Transcript will now be created based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

10. Click **Create** to begin the import process. When the progress bar reaches the end, the import is complete.


Import from LiveNote(TM) / VideoNote(TM) files
The new Digital Video Transcript has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

11. Review the import results carefully to ensure that no errors were encountered.
12. Then select **OK** to complete the import process.

More Information:

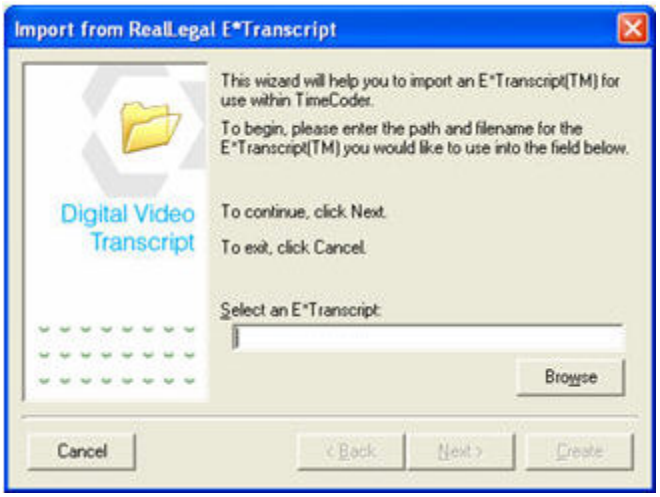
- Importing Digital Video Transcripts

TimeCoder - Importing RealLegal™ E*Transcript™ Files

When a synchronized transcript is imported from a RealLegal™ E*Transcript™ file, you will need to import the .ptx file that was created in the original application.

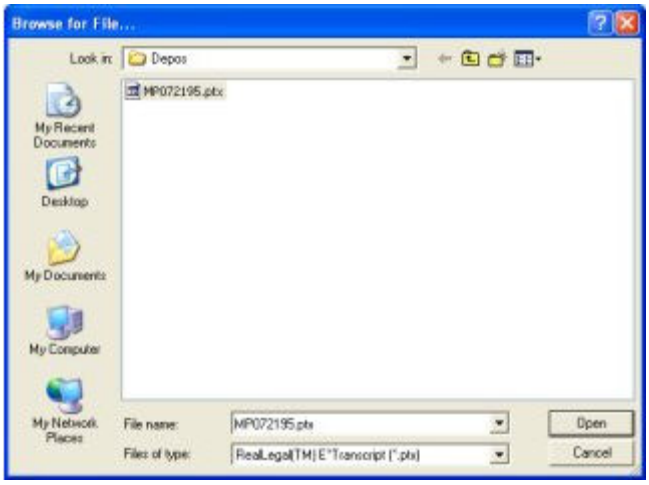
To import files from RealLegal:

1. Select **Import from... | RealLegal™ E*Transcript™ (*.ptx)** from the **File** menu.


Import from RealLegal E*Transcript
This wizard will help you to import an E*Transcript(TM) for use within TimeCoder.
To begin, please enter the path and filename for the E*Transcript(TM) you would like to use into the field below.
Digital Video Transcript
To continue, click Next.
To exit, click Cancel.
Select an E*Transcript:
Browse
Cancel
< Back
Next >
Create

2. Enter a destination folder and filename for the *.PTX file, or click **Browse** to navigate to the desired folder and filename.

a. If you click **Browse**, the following window appears:

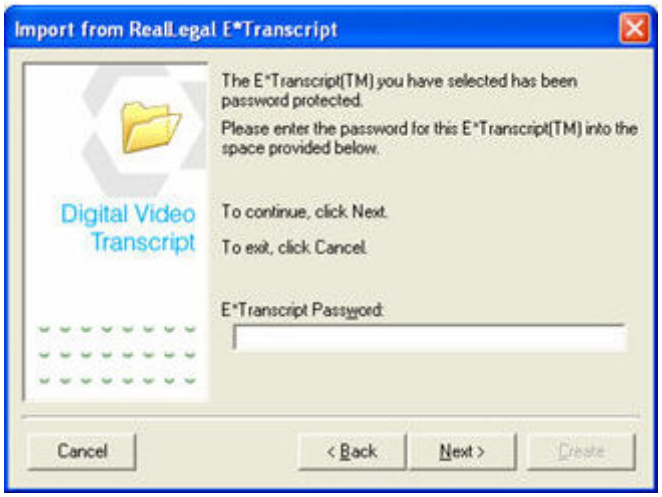


b. Select the desired destination folder and .PTX file and click [OPEN].

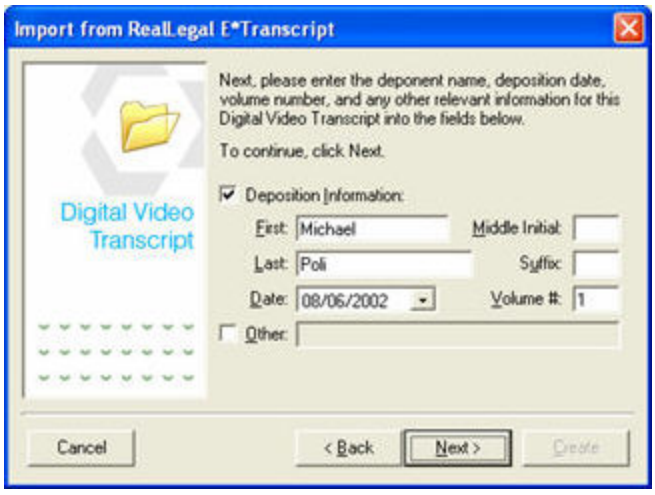
NOTE: *TimeCoder Pro can import either the .PTX or .EXE format of E*Transcript files.*

3. When the desired folder and filename are selected, click **Next**.

4. If the selected .PTX/.EXE file requires a password, the following dialog will be displayed.


Import from RealLegal E*Transcript
The E*Transcript(TM) you have selected has been password protected.
Please enter the password for this E*Transcript(TM) into the space provided below.
Digital Video Transcript
To continue, click Next.
To exit, click Cancel.
E*Transcript Password:
Cancel
< Back
Next >
Create

5. Enter the required password and click **Next** to continue. The password is generated by the authoring entity of the E*Transcript file. If the password cannot be obtained, the file cannot be imported. You will have to contact the author of the E*Transcript file to obtain the password.

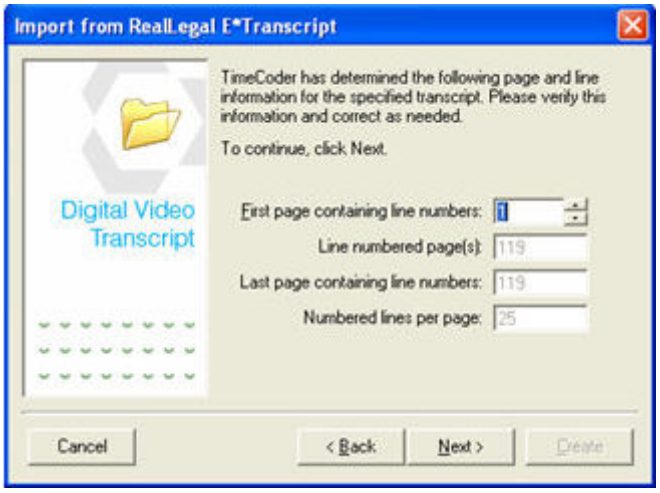


6. Enter the information for the deponent.

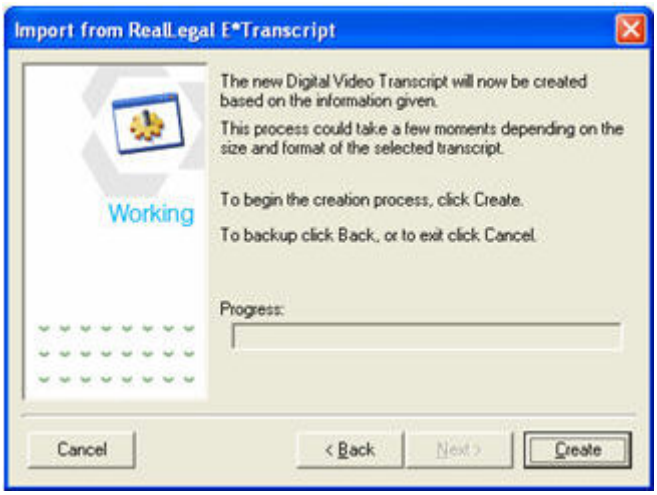
First Name	Deponent's first name
Middle Initial	Deponent's middle initial
Last Name	Deponent's last name
Suffix	Suffix appended to deponent's name. Examples: Jr., Sr., Esq.
Date	Deposition date

Volume #	Deposition volume number
Other	Additional information

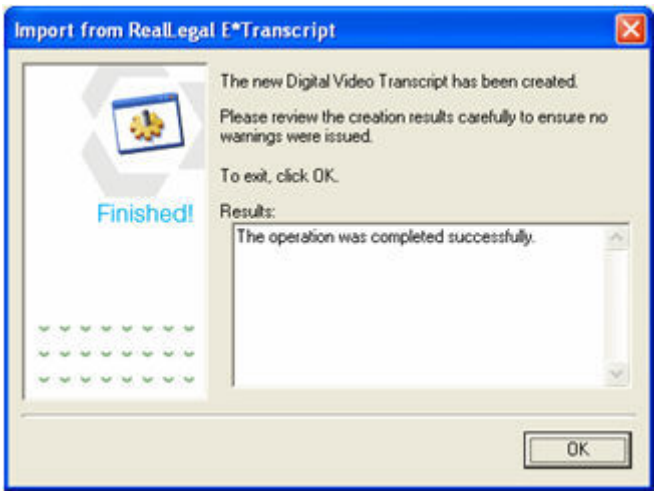
7. The Deposition Information and Other Information can be enabled or disabled by checking or removing the checkmark from their respective boxes; however, both cannot be disabled at the same time. If you choose to enable the Deposition Information, the FIRST, LAST, DATE and VOLUME # fields must be filled in. If you choose to enable the Other Information, the OTHER field must be filled in.
8. When you are finished entering information into the fields, click **Next**.


Import from RealLegal E*Transcript
TimeCoder has determined the following page and line information for the specified transcript. Please verify this information and correct as needed.
To continue, click Next.
Digital Video Transcript
First page containing line numbers:
Line numbered page(s):
Last page containing line numbers:
Numbered lines per page:
Cancel
< Back
Next >
Create

9. If the first page of the transcript that contains line numbers is a page other than one, enter the correct page number or use the small arrow buttons to select the correct page number.
10. Click **Next** to continue.


Import from RealLegal E*Transcript
The new Digital Video Transcript will now be created based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

11. This window indicates that you are ready to import the DVT. Click **Create** to begin the import process.


Import from RealLegal E*Transcript
The new Digital Video Transcript has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

12. Review the import results carefully to ensure that no errors were encountered.
13. Select **OK** to complete the import process.

More Information:

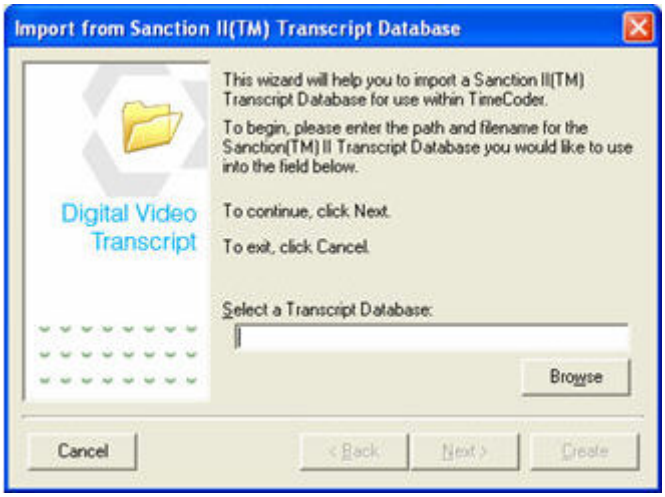
- Importing Digital Video Transcripts

TimeCoder - Importing a Sanction II Transcript Database

When a synchronized transcript database is created within the Sanction II™ application, the corresponding *.mdb file can be imported into Timecoder.

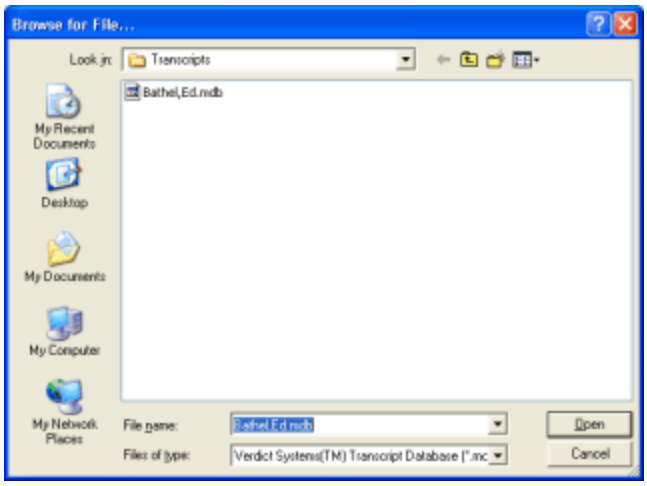
Follow these steps to import from a Sanction II™ Transcript Database file:

1. Select **Import from... | Sanction II Transcript Database (*.mdb)** from the **File** menu.


Import from Sanction II(TM) Transcript Database
This wizard will help you to import a Sanction II(TM) Transcript Database for use within TimeCoder.
To begin, please enter the path and filename for the Sanction(TM) II Transcript Database you would like to use into the field below.
Digital Video Transcript
To continue, click Next.
To exit, click Cancel.
Select a Transcript Database:
Browse
Cancel
< Back
Next >
Create

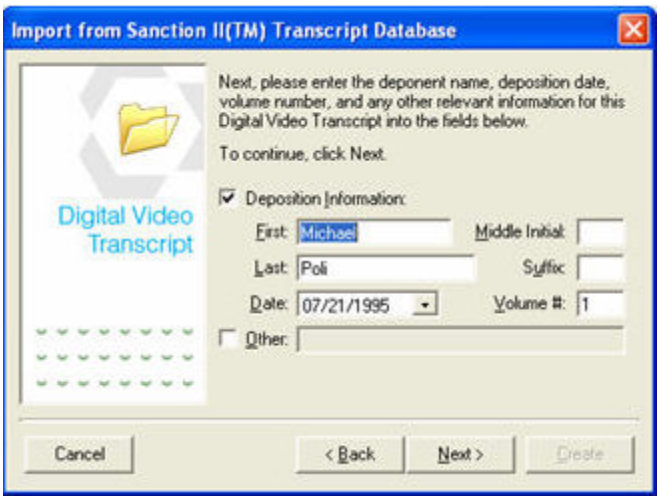
2. Enter a destination path and filename for the *mdb file, or click **Browse** to navigate to the desired path and filename.

   a. If you click **Browse**, the following window appears:



   b. Select the desired destination folder and *.mdb file. Click **Open**.

3. When the desired path and filename are selected, click **Next**. The following window appears:



4. Enter the information for the deponent.

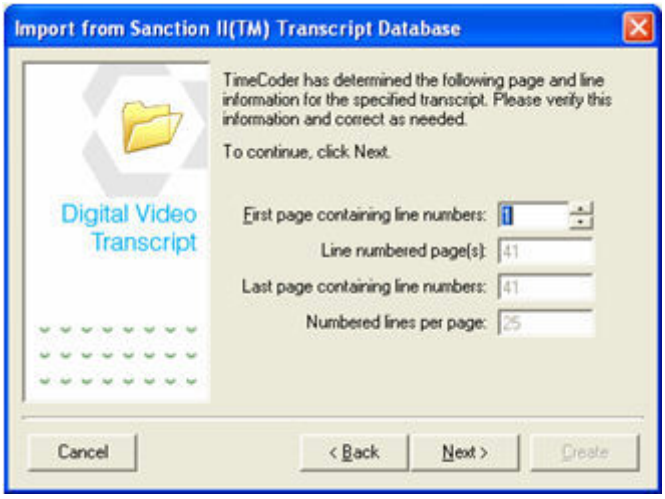
   The following fields are available:

Field	Description
First Name	Deponent's first name
Middle Initial	Deponent's middle initial
Last Name	Deponent's last name

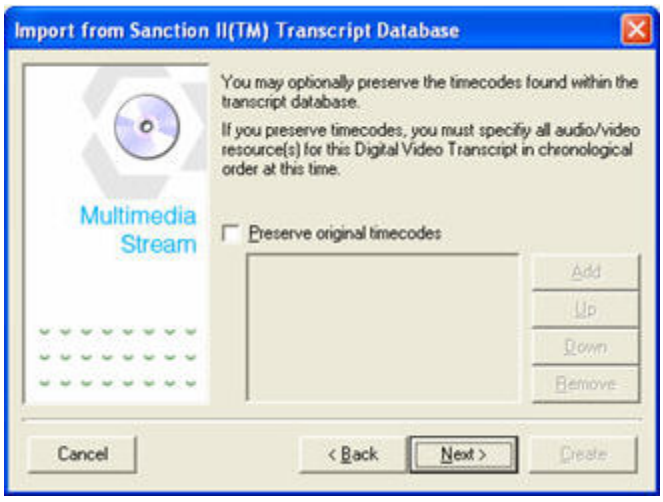
Surname	Deponent's surname
Date	Deposition date
Volume #	Deposition volume number
Other	Additional information

The Deposition Information and Other Information can be enabled or disabled by checking or removing the checkmark from their respective boxes; however, both cannot be disabled at the same time. If you choose to enable the Deposition Information, the First, Last, Date and Volume # fields must be filled in. If you choose to enable the Other Information, the Other field must be filled in.

5. When you are finished entering information into the fields, click **Next**.

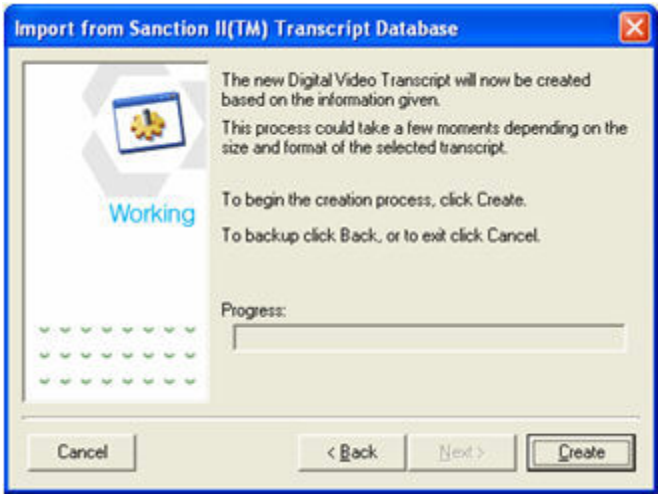

Import from Sanction II(TM) Transcript Database
TimeCoder has determined the following page and line information for the specified transcript. Please verify this information and correct as needed.
To continue, click Next.
Digital Video Transcript
First page containing line numbers:
Line numbered page(s):
Last page containing line numbers:
Numbered lines per page:
Cancel
< Back
Next >
Create

6. If the first page of the transcript that contains line numbers is a page other than one, enter the correct page number or use the small arrow buttons to select the correct page number.
7. Click **Next** to continue.
8. Once all adjustments are made, if necessary, select **Next** to continue. The following window will appear.

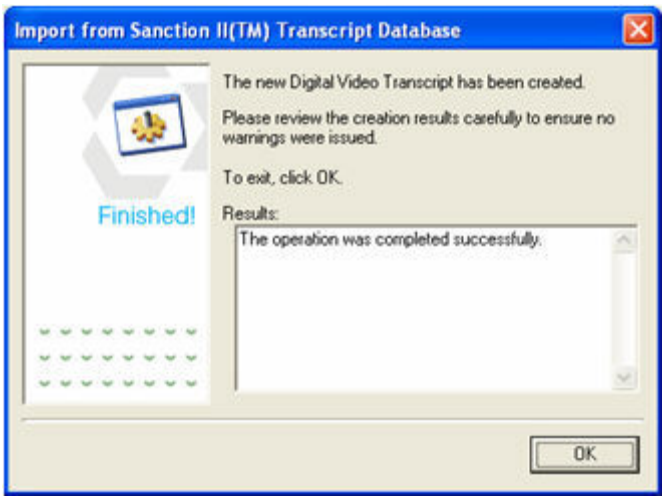

Import from Sanction II(TM) Transcript Database
You may optionally preserve the timecodes found within the transcript database.
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve original timecodes
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

This window will allow you to preserve timecodes which may appear in the original printed transcript. If you want to preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order. Click here for instructions on preserving timecodes.

7. If you choose not to preserve original printed timecodes, select **Next** to continue. The following window will appear:


Import from Sanction II(TM) Transcript Database
The new Digital Video Transcript will now be created based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

8. Click **Create** to begin the creation process. The following window appears:


Import from Sanction II(TM) Transcript Database
The new Digital Video Transcript has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

9. Review the import results carefully to ensure that no errors were encountered, then select **OK** to complete the import process.

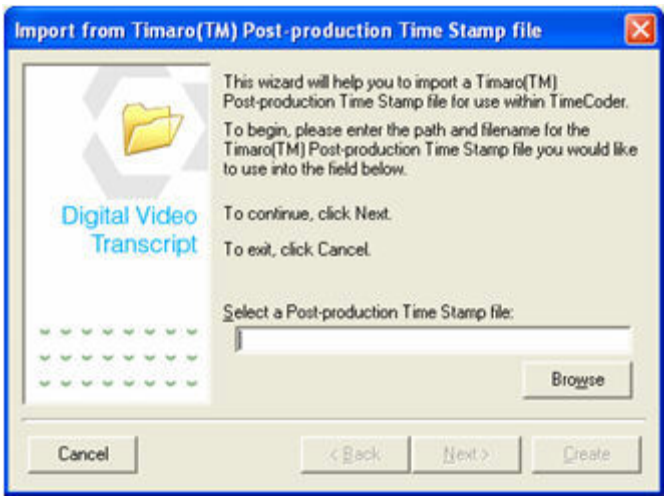
More Information:

- Import TrialDirector Case File
- Import LiveNote / VideoNote Files
- Import TrialPro / Timaro Timestamp Files

TimeCoder - Importing Timaro Post-production Time Stamp Files

When a synchronized transcript is imported from a Timaro™ Post-production Timestamp file, you will need to import the *.pts file that was created in the original application.

1. Select **Import from... | Timaro Post-production Time Stamp File (*.pts)** from the File menu.

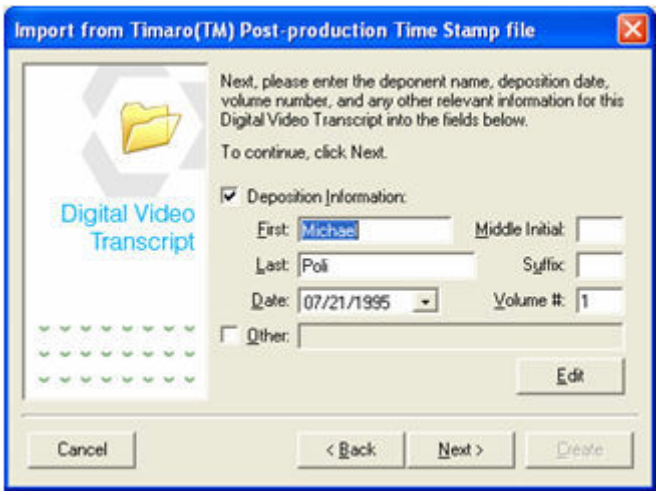

Import from Timaro(TM) Post-production Time Stamp file
This wizard will help you to import a Timaro(TM) Post-production Time Stamp file for use within TimeCoder.
To begin, please enter the path and filename for the Timaro(TM) Post-production Time Stamp file you would like to use into the field below.
To continue, click Next.
To exit, click Cancel.
Digital Video Transcript
Select a Post-production Time Stamp file:
Browse
Cancel
< Back
Next >
Create

2. Enter a destination path and filename for the *.pts file, or click **Browse** to navigate to the desired path and filename.

   a. If you click **Browse**, the following window appears:

   b. Select the desired destination folder and *.pts file, Click **Open**.

3. Once the desired path and filename are selected, click **Next**. The following window appears:



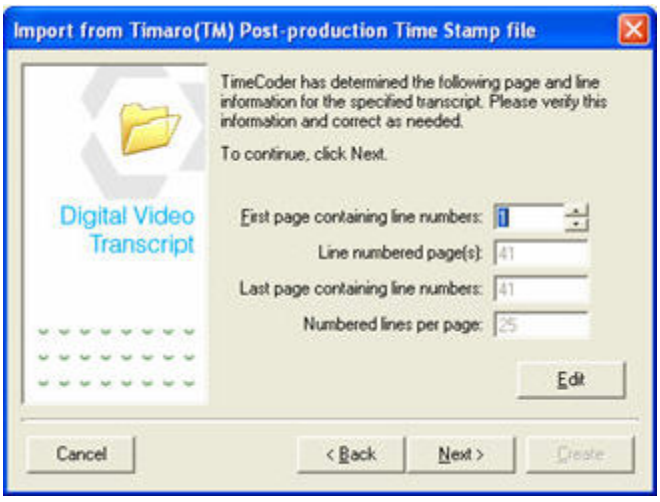
4. Enter the information for the deponent. The following fields are available:

Field	Description
First Name	Deponent's first name
Middle Initial	Deponent's middle initial
Last Name	Deponent's last name
Suffix	Suffix added to Deponents name, such as Jr., Sr., Esq.
Date	Deposition date
Volume #	Deposition volume number
Other	Additional information

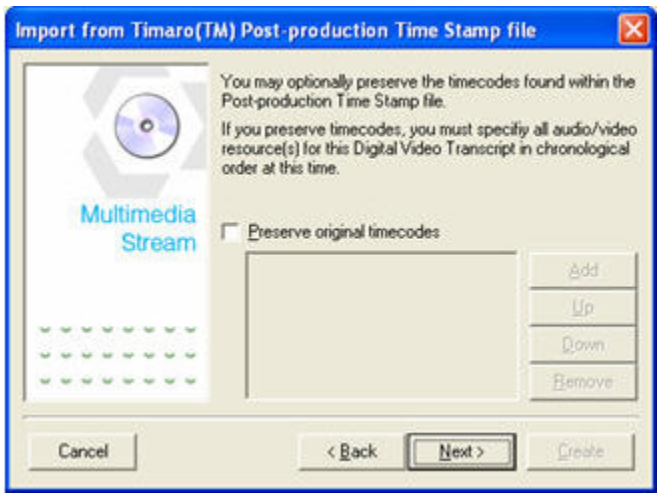
The Deposition Information and Other Information can be enabled or disabled by checking or removing the checkmark from their respective boxes; however, both cannot be disabled at the same time.

If you choose to enable the Deposition Information, the First, Last, Date and Volume # fields must be filled in. If you choose to enable the Other Information, the Other field must be filled in

5. When you are finished entering information into the fields, click **Next**.

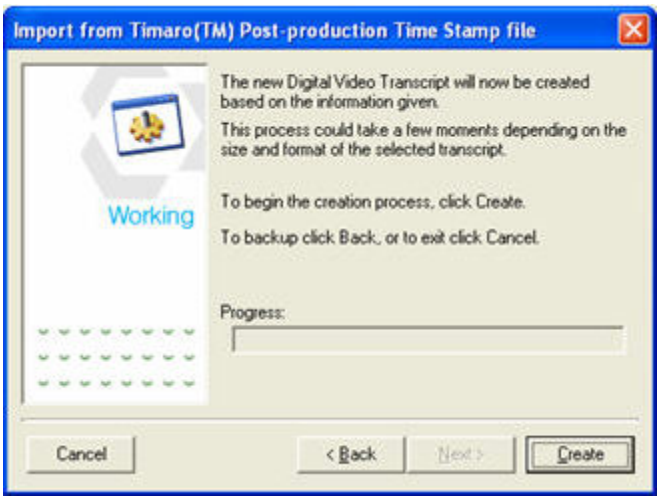

Import from Timaro(TM) Post-production Time Stamp file
TimeCoder has determined the following page and line information for the specified transcript. Please verify this information and correct as needed.
To continue, click Next.
Digital Video Transcript
First page containing line numbers:
Line numbered page(s):
Last page containing line numbers:
Numbered lines per page:
Edit
Cancel
< Back
Next >
Create

6. If the first page of the transcript that contains line numbers is a page other than one, enter the correct page number or use the small arrow buttons to select the correct page number.
7. Click **Next** to continue.

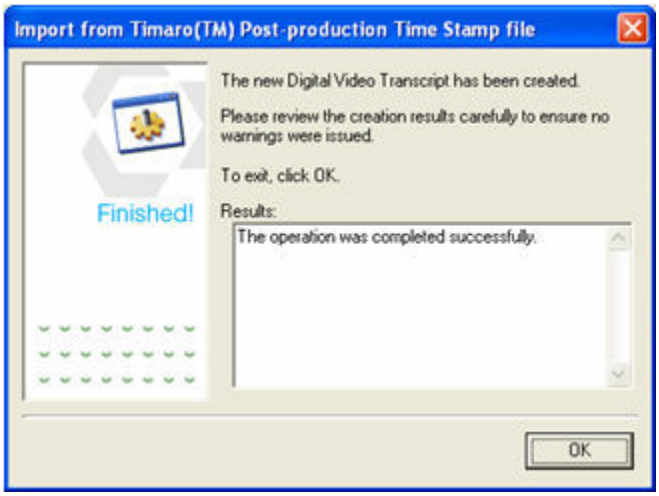

Import from Timaro(TM) Post-production Time Stamp file
You may optionally preserve the timecodes found within the Post-production Time Stamp file.
If you preserve timecodes, you must specifiy all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve original timecodes
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

This window will allow you to preserve the original timecodes within the Post Production Timestamp (*.pts) file. If you want to preserve timecodes, you must specify all audio/video resource(s) associated with the .PTS file in **chronological order**. Click here for instructions on preserving timecodes.

8. Click **Next** to continue.
9. If you choose **not** to preserve original printed timecodes, select **Next** to continue. The following window will appear:


Import from Timaro(TM) Post-production Time Stamp file
The new Digital Video Transcript will now be created based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

10. Click **Create** to finish the creation process. The following window appears:


Import from Timaro(TM) Post-production Time Stamp file
The new Digital Video Transcript has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

11. Review the export results to ensure that the operation was completed successfully. Click **OK** to exit the export process.

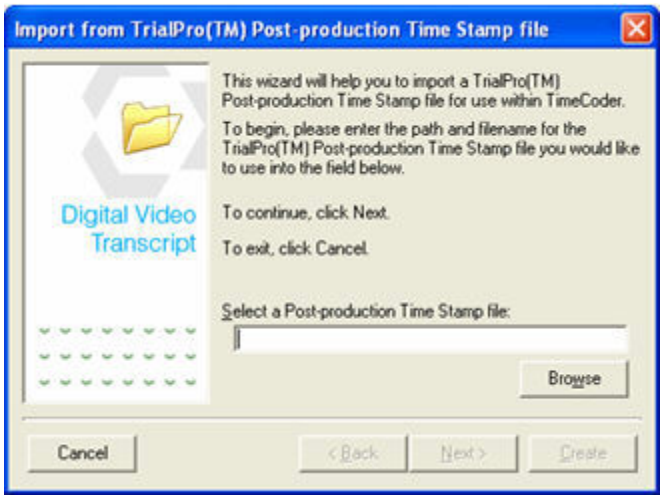
More Information:

- Import TrialDirector Case File
- Import LiveNote / VideoNote Files
- Import Sanction II™ Transcript Database

TimeCoder - Importing TrialPro Post-production Time Stamp Files

When a synchronized transcript is imported from a TrialPro™ Post-production Timestamp file, you will need to import the *.pts file that was created in the original application.

1. Select **Import from... | TrialPro Post-production Time Stamp File (*.pts)** from the File menu.

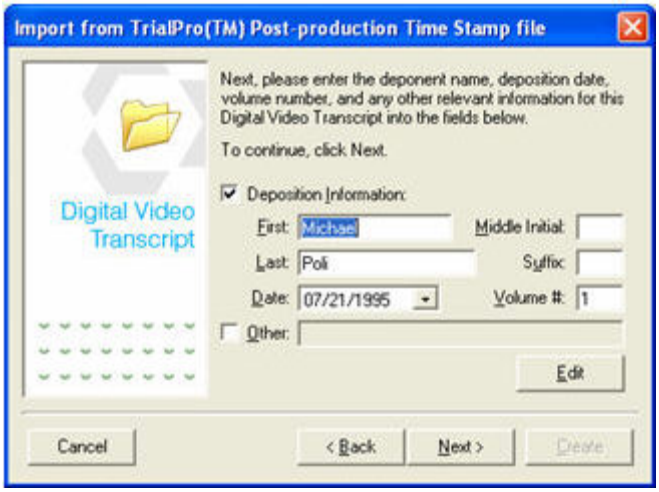

Import from TrialPro(TM) Post-production Time Stamp file
This wizard will help you to import a TrialPro(TM) Post-production Time Stamp file for use within TimeCoder.
To begin, please enter the path and filename for the TrialPro(TM) Post-production Time Stamp file you would like to use into the field below.
To continue, click Next.
To exit, click Cancel.
Digital Video Transcript
Select a Post-production Time Stamp file:
Browse
Cancel
< Back
Next >
Create

2. Enter a destination path and filename for the *.pts file, or click **Browse** to navigate to the desired path and filename.

   a. If you click **Browse**, the following window appears:

   b. Select the desired destination folder and *.pts file, Click **Open**.

3. Once the desired path and filename are selected, click **Next**. The following window appears:



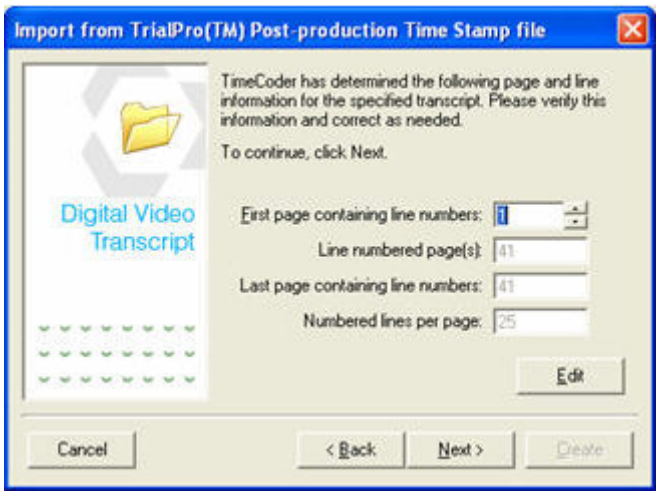
4. Enter the information for the deponent. The following fields are available:

Field	Description
First Name	Deponent's first name
Middle Initial	Deponent's middle initial
Last Name	Deponent's last name
Suffix	Suffix added to Deponents name, such as Jr., Sr., Esq.
Date	Deposition date
Volume #	Deposition volume number
Other	Additional information

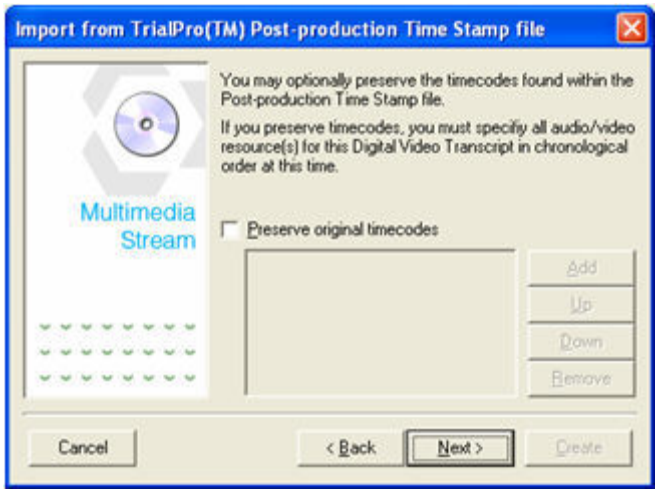
The Deposition Information and Other Information can be enabled or disabled by checking or removing the checkmark from their respective boxes; however, both cannot be disabled at the same time.

If you choose to enable the Deposition Information, the First, Last, Date and Volume # fields must be filled in. If you choose to enable the Other Information, the Other field must be filled in

5. When you are finished entering information into the fields, click **Next**.

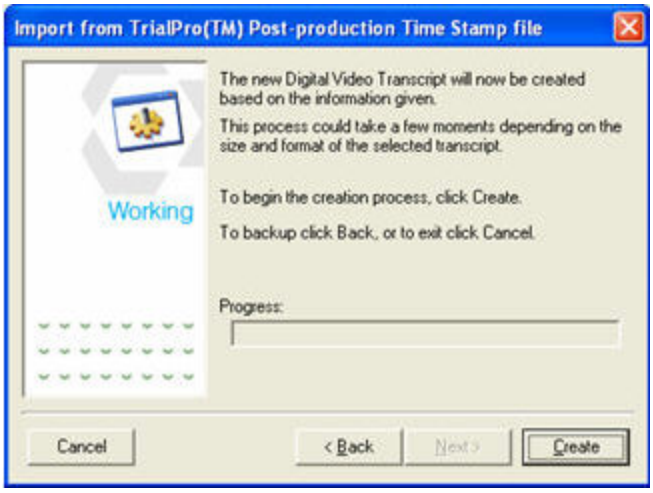

Import from TrialPro(TM) Post-production Time Stamp file
TimeCoder has determined the following page and line information for the specified transcript. Please verify this information and correct as needed.
To continue, click Next.
Digital Video Transcript
First page containing line numbers: 1
Line numbered page(s): 41
Last page containing line numbers: 41
Numbered lines per page: 25
Edit
Cancel
< Back
Next >
Create

6. If the first page of the transcript that contains line numbers is a page other than one, enter the correct page number or use the small arrow buttons to select the correct page number.
7. Click **Next** to continue.

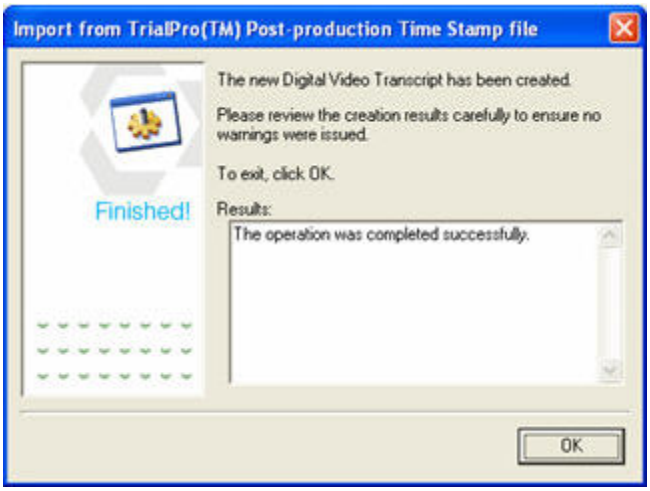

Import from TrialPro(TM) Post-production Time Stamp file
You may optionally preserve the timecodes found within the Post-production Time Stamp file.
If you preserve timecodes, you must specify all audio/video resource(s) for this Digital Video Transcript in chronological order at this time.
Multimedia Stream
Preserve original timecodes
Add
Up
Down
Remove
Cancel
< Back
Next >
Create

This window will allow you to preserve the original timecodes within the Post Production Timestamp (*.pts) file. If you want to preserve timecodes, you must specify all audio/video resource(s) associated with the .PTS file in **chronological order**. Click here for instructions on preserving timecodes.

8. Click **Next** to continue.
9. If you choose **not** to preserve original printed timecodes, select **Next** to continue. The following window will appear:


Import from TrialPro(TM) Post-production Time Stamp file
The new Digital Video Transcript will now be created based on the information given.
This process could take a few moments depending on the size and format of the selected transcript.
Working
To begin the creation process, click Create.
To backup click Back, or to exit click Cancel.
Progress:
Cancel
< Back
Next >
Create

10. Click **Create** to finish the creation process. The following window appears:


Import from TrialPro(TM) Post-production Time Stamp file
The new Digital Video Transcript has been created.
Please review the creation results carefully to ensure no warnings were issued.
To exit, click OK.
Finished!
Results:
The operation was completed successfully.
OK

11. Review the export results to ensure that the operation was completed successfully. Click **OK** to exit the export process.

More Information:

- Import TrialDirector Case File
- Import LiveNote / VideoNote Files
- Import Sanction II™ Transcript Database

Data Grid Viewer

The Data Grid Viewer provides an alternative to the Case Explorer tree for viewing and managing case documents. It displays a list of all documents in your case that you can sort based on specific fields. When you click on any field in the viewer, the associated file opens on the right side of the main TrialDirector window.

The Data Grid Viewer does not display transcripts or multimedia files.

Note: The Data Grid Viewer opens in read-only mode by default. If you enable field editing, you can edit item information directly in the Data Grid Viewer. Changes are saved automatically and any existing data is overwritten.

To open the Data Grid Viewer:

- On the **Tools** menu, click **Data Grid Viewer**.

To sort the list of items:

1. Click the column heading you want to sort by.
2. To reverse the sort order (descending instead of ascending), click the column heading again.

To move a column:

- Click and drag the column heading to the desired location.

To enable field editing:

1. On the **Documents** menu, select **Enable Item I.D. Field Editing**.
2. In the **Data Grid Viewer**, click in any field and add or edit text as needed.

   Changes are saved automatically and any existing data is overwritten.

More Information:

- Case Explorer

Appendices

Appendices

Topics:

- Sample Files
- DDE Link Commands
- Custom Footer Commands
- Supported File Formats
- Multimedia Controls
- Additional Commands and Shortcuts
- Deposition Clip Editing 10-Key Controls
- Available Case Privileges Profile Options
- Clip Naming Customization Commands
- Copyright Acknowledgements

Appendix A - Sample Files

Topics:

- Clip Creation Script
- Cross-Reference File
- Load Files
- Memo Batch File
- Print List File
- Problems List
- Subset Case Batch File

Clip Creation Script File

Clip creation script files list segment ranges, sorted by clip, for automatic clip creation in Transcript Manager. The file also offers the ability to open a specific Digital Video Transcript and override the default clip identifier and description generated by Transcript Manager.

The following is a list of possible commands:

Command	Function
!Deposition	Opens the first matching Digital Video Transcript found.
C(Clip Identifier)	Overrides the default clip identifier.
D(Description)	Overrides the default clip description.
####	A series of four numbers separated by any non-numeric character represents the beginning page and

	line or ending page and line of a segment. The page or line specification can also be represented by a single digit number (e.g., 1:1=page 1, line 1).
Blank line	Indicates the end of a clip.

The format for a clip creation script is as follows:

!(Poli, Michael)
C(POLI0001)
D(Review of Exhibit 417)
12,15-12,20
15,1-15,23

First, the Digital Video Transcript with a description that most closely matches “Poli, Michael” will be opened. If there are multiple volumes with a similar description, you can further specify the volume by using an asterisk to indicate an unknown quantity of characters, as shown in the example below:

!(Poli, Michael*Vol. 02)

If the command to open a Digital Video Transcript is left out of the clip creation script, Transcript Manager will create the clips from whichever Digital Video Transcript is currently open.

Second, using the opened Digital Video Transcript, a new clip will be created containing two segments (page 12, line15 to page 12, line 20 and page 15, line 01 to page 15, line 23). The page and line numbers can be separated by any non-numeric characters, as illustrated in the variations shown below:

12 15 12 20
12:15 12:20

The new clip will have an identifier of “POLI0001” and a description of “Review of Exhibit 417”. The default clip identifier and clip description will be assigned to the clip if none are specified.

For example, the following entry in the clip creation script would create a clip with the default clip identifier and clip description.

!(Poli, Michael)
12:15 12:20
15:1 15:23

Multiple clips can be created by separating each clip with a blank line in the clip creation script, as shown in the example below:

12:15 12:20
15:1 15:23

17:3 17:16
17:19 17:25

Clips can be created from several Digital Video Transcripts using the same clip creation script, as shown in the example below:

!(Poli, Michael)
12:15 12:20
15:1 15:23

!(Technology News)
1:3 1:10

All errors, such as illegal page/line references, typos, segments that cross video boundaries, or unmatched Digital Video Transcripts will be sent to an error file for later quality control.

Cross-Reference File

Cross-reference files list the original Item IDs (Object IDs) with an arrow pointing to the corresponding new Item IDs for items that are renamed in a subset case.

ABC001 -> XYZ001-001
ABC002 -> XYZ001-001
ABC003 -> XYZ002-001
ABC004 -> XYZ003-001
ABC005 -> XYZ004-001
ABC006 -> XYZ005-001
ABC007 -> XYZ006-001

Load Files

- Object Load List (.oll)
- Generic Tiff Load File

Object Load List (.oll)

The load file establishes relationships for multiple page documents and determines which tab each item should be associated with.

The Object Load List format is as follows:

“Tab”,“DocumentID”,“PageID”,“Page No”,“Description”,“Volume”,“Path”,“Filename”,“”

Sample multiple page document lines in the load file might look like the following:

"1","TDX00008","TDX00008","1","","","Docs\001","0000001.tif",""
"1","TDX00008","TDX00009","2","","","Docs\001","0000002.tif",""

Sample multiple page TIFF lines might look like the following:

"1","EXH001","EXH001","1","","","Docs\001","0000001.tif",""
"1","EXH001","EXH002","2","","","Docs\001","0000001.tif",""
"1","EXH001","EXH003","3","","","Docs\001","0000001.tif",""
"1","EXH001","EXH004","4","","","Docs\001","0000001.tif",""

A sample photograph line might look like the following:

"2","MRI01","MRI01","1","MRI film","","Photo\001","0000003.jpg",""

A sample multimedia file line might look like the following:

"4","Gates1","Gates1","1","","","Video\001","gates1.mpg",""

The load file is an ASCII delimited file that contains the following nine fields:

Field	Description
Field 1	**Record Type** - Determines the tab with which the item will associated. These are the available record types: 1 - B&W Image Documents 2 - Color Photographs 4 - Multimedia Files 5 - OLE Files
Field 2	**Document ID** - if there are multiple pages to an item, all will have the same Document ID, which is the same as the first page of the document. This field is limited to 20 alphanumeric characters and may include spaces.
Field 3	**Item ID** - this indicates the page number in a multiple page item. This number combined with the Document ID must be unique. This field is limited to 20 alphanumeric characters and may include spaces. For Video segment items, Document Manager adds four characters to the end of the Item ID. Keep this in mind so you do not exceed the 20-character limit.
Field 4	**Page Number** - the Document ID is the same for each page in the item. The page should be incremented by 1 for each following page. Items with no multiple page association (i.e., OLE links) are

	always page 1. Videos can have clips and multiple segments, but once a segment is created the number cannot be reused. ***Note:*** *Since long file names create long barcodes, which may not fit the print options, try to keep Item ID between 5 and 12 characters if you plan on printing barcodes.*
Field 5	**Description** - this field is not required and is editable within the Case Explorer.
Field 6	**Volume Label** - this field can be blank as long as the load file (.OLL) exists on the same volume as the files and images. The path is relative to the location (path) of the .OLL file. Paths are Volume label based so that on removable drive systems, the drives can change and Document Manager will continue to find the items.
Field 7	**Path** - stores the exact location of the item with no leading or trailing backslash.
Field 8	**Filename** - the actual filename of the object (e.g., 001.TIF).
Field 9	**Special Field** - used internally by Document Manager only. If you are creating a load file, leave this position empty. If you are editing an existing load file, do not modify this position.

Generic Tiff Load File

Several popular image production systems produce image volumes containing a load file in the following format:

G0010104,Y,E:\Sh03EX08\0101\01010001.tif
G0010105,,E:\Sh03EX08\0101\01010002.tif
G0010106,,E:\Sh03EX08\0101\01010003.tif
G0010107,,E:\Sh03EX08\0101\01010004.tif
G0010108,,E:\Sh03EX08\0101\01010005.tif
G0010109,,E:\Sh03EX08\0101\01010006.tif
G0010110,,E:\Sh03EX08\0101\01010007.tif
G0010111,,E:\Sh03EX08\0101\01010008.tif
G0010112,,E:\Sh03EX08\0101\01010009.tif
G0010113,,E:\Sh03EX08\0101\01010010.tif

Field	Description
Field 1	Item ID or Bates Number
Field 2	Y if it is the beginning of a new document
Field 3	Full path to image

Memo Batch File

Memo list files consist of two fields: the Item ID and the memo text. The fields can be enclosed by quotes and separated a comma, as shown in the first example below, or they can be enclosed by carrot and separated by a pipe, as shown in the second example below. If the memo text has quotes in it, the latter format may be preferred.

“ABC001”,”Payroll checks for December 1998”
“ABC002”,”Memo from J. Walker to A. Sanger”
“ABC006”,”S. Mahoney's letter of resignation”

OR

^ABC001^|^Payroll checks for December 1998^
^ABC002^|^Memo from J. Walker to A. Sanger^
^ABC006^|^S. Mahoney's letter of resignation^

You do not have to have an entry for each item in the case. Document Manager will simply attach notes to the items that are listed.

Print List File

Print list files can be in document entry or page range entry format.

A batch file must be in one format or the other and cannot be a mixture. Document Manager looks at the first line in the batch file to determine which format your file is in and it assumes that the rest of the file is in the same format.

Document Entries

If the first line in the batch file is in document format, Document Manager will assume the entire file is in document format. The document entry format simply lists the Document IDs of the documents.

ABC001
ABC002
ABC005
ABC007

When the batch file is in document entry format, Document Manager ignores everything after the first space in each entry (e.g., “ABC001 – ABC002” would be treated as “ABC001”). However, if the first line in the batch file has a range entry, Document Manager will assume the batch file is in page range entry format and will treat it as such.

Page Range Entries

If the first line in the batch file is in page range format, Document Manager will assume the entire file is in page range format. The page range entry format lists the beginning Page ID and the ending Page ID, separated by a space dash space.

ABC001 - ABC001
ABC002 - ABC004
ABC005 - ABC006
ABC007 - ABC007

Pages can also be listed as specific page numbers of a document. In this case, the Document ID is followed by a pipe (|) and then the page number of the document. For example, the same list from above could also look like this:

ABC001|1 - ABC001|1
ABC002|1 - ABC004|3
ABC005|1 - ABC006|2
ABC007|1 - ABC007|1

If a beginning Page ID is listed without an ending Page ID, it will be treated as a one page range (i.e., “ABC001” or “ABC001|1” would be treated as “ABC001 – ABC001” or “ABC001|1 – ABC001|1”). However, if the first line in the batch file does not have an ending Page ID, Document Manager will assume the batch file is in document entry format and will treat it as such.

Note: *If video or deposition items are listed in the print list file, a placeholder image will be printed in place of the item. The footer and barcode will still be printed, if selected.*

Problems List

Problems list files consist of a list of Item IDs (Object IDs) that have duplicate entries in the batch file or were not found in the case.

ObjId 'ABC020' was not found in the case.
ObjId 'ABC021' was not found in the case.
ObjId 'ABC022' was not found in the case.
Duplicate Record on -> ABC010 pg 1 ABC010
Duplicate Record on -> ABC010 pg 2 ABC011
Duplicate Record on -> ABC010 pg 3 ABC012

There is an entry for each occurrence of a duplicate or missing Item ID.

Subset Case Batch File

- Rename Items in a Subset Case
- Assign Exhibit Numbers or Trial Exhibit Numbers to Items in a Subset Case

The subset case batch file can be in document entry or page range entry format. Select the format your batch file is in from the **Create New Case From Batch Fie** dialog box.

Document Entries

The document entry format simply lists the Document IDs of the documents.

ABC001
ABC002
ABC005
ABC007

When the batch file is in document entry format, Document Manager ignores everything after the first space in each entry (e.g., “ABC001 – ABC002” would be treated as “ABC001”).

Page Range Entries

The page range entry format lists the beginning Page ID and the ending Page ID, separated by a space dash space.

ABC001 – ABC001
ABC002 – ABC004
ABC005 – ABC006
ABC007 – ABC007

If a beginning Page ID is listed without an ending Page ID, it will be treated as a one-page range (i.e., “ABC001” would be treated as “ABC001 – ABC001”).

Each page range entry in the subset case batch file will become a document in the new case, regardless of where the beginning and ending Page IDs fall in the original case.

For example, ABC002 will become the first page of a new document in the new case even if it was the second page of a document in the original case.

Rename Items in a Subset Case

There are two ways to rename items in a subset case:

- Enter a new beginning Item ID in the **Create New Case From Batch File** dialog box. All remaining items are renumbered sequentially.

  OR

- Enter a new Item ID for each entry in the batch file. This method allows you more control because entries do not have to be renamed sequentially and not all entries have to be renamed.

Entering a new beginning Item ID in the dialog box will override anything entered in the batch file.

Enter a New Beginning Item ID in the Dialog Box

The **Create New Case From Batch File** dialog box allows you to rename the items in the subset case by entering a beginning Item ID in the **Start Renaming With** field. The beginning Item ID will be incremented at each document or each page, depending on which option is selected in the dialog box. The results for each option are shown in Tables 1 and 2.

For example, if you entered XYZ001 in the **Start Renaming With** field, the items in the sample batch files below would be renamed as shown in Tables 1 and 2, respectively.

Document Entry Format
ABC001
ABC002
ABC005
ABC007

OR

Page Range Entry Format
ABC001 – ABC001
ABC002 – ABC004
ABC005 – ABC006
ABC007 – ABC007

Sequencing format when incremented at each document:

Document ID	Page ID	New Item ID
ABC001	ABC001	XYZ001-001
ABC002	ABC002 ABC003 ABC004	XYZ002-001 XYZ002-002 XYZ002-003
ABC005	ABC005 ABC006	XYZ003-001 XYZ003-002
ABC007	ABC007	XYZ004-001

Table 1

Sequencing format when incremented at each page:

Document ID	Page ID	New Item ID
ABC001	ABC001	XYZ001
ABC002	ABC002 ABC003 ABC004	XYZ002 XYZ003 XYZ004
ABC005	ABC005 ABC006	XYZ005 XYZ006
ABC007	ABC007	XYZ007

Table 2

Enter a New Item ID in the Batch File

For each entry in the batch file, you can enter a new Item ID. The format is as follows:

ABC001 as XYZ001
ABC002 as XYZ002
ABC005 as XYZ003
ABC007 as XYZ004

OR

ABC001 – ABC001 as XYZ001
ABC002 – ABC004 as XYZ002
ABC005 – ABC006 as XYZ003
ABC007 – ABC007 as XYZ004

The items would be renamed as shown in Table 1 above.

Assign Exhibit Numbers or Trial Exhibit Numbers to Items in a Subset Case

You can assign exhibit numbers or trial exhibit numbers to entries in a subset case batch file, regardless of whether or not you are renaming the entries. Simply add the exhibit number or trial exhibit number entry to the end of each batch file entry. The format is as follows:

Exhibit Number
ABC001 [EXNO=EXH001]
ABC002 [EXNO=EXH002]
ABC005 [EXNO=EXH003]
ABC007 [EXNO=EXH004]

OR

ABC001 – ABC001 [EXNO=EXH001]
ABC002 – ABC004 [EXNO=EXH002]
ABC005 – ABC006 [EXNO=EXH003]
ABC007 – ABC007 [EXNO=EXH004]

Trial Exhibit Number
ABC001 [TREXNO=EXH001]
ABC002 [TREXNO=EXH002]
ABC005 [TREXNO=EXH003]
ABC007 [TREXNO=EXH004]

OR

ABC001 – ABC001 [TREXNO=EXH001]
ABC002 – ABC004 [TREXNO=EXH002]
ABC005 – ABC006 [TREXNO=EXH003]
ABC007 – ABC007 [TREXNO=EXH004]

The items would be assigned exhibit numbers or trial exhibit numbers as shown in Table 3.

Document ID	Page ID	EXNO or TREXNO
ABC001	ABC001	EXH001-001
ABC002	ABC002 ABC003 ABC004	EXH002-001 EXH002-002 EXH002-003
ABC005	ABC005 ABC006	EXH003-001 EXH003-002
ABC007	ABC007	EXH004-001

Table 3

You cannot assign an exhibit number **and** a trial exhibit number to entries in a subset case file.

More Information:

- Appendices

Appendix B - DDE Link Commands

DDE Link Commands allow you to pass commands to TrialDirector through DDE compatible applications.

Application Name=TrialDirector
Topic=DDImage

The following is an alphabetized list of DDE Execute Commands or Clipboard Messages that TrialDirector will recognize.

[DISPLAYIMAGE(*Item ID*)]

Displays the item associated with the specified Item ID.

Note: *This command is preferable to the showimage command when you are not using CT Summation Enterprise or iBlaze.*

[EXIT]

Closes TrialDirector.

[HASIMAGE(*Item ID*)]

Searches the current case for the specified Item ID. TrialDirector responds with a DDE execute of [HASIMAGE(FALSE)] or [HASIMAGE(TRUE)].

[HIDEIMAGE]

Hides the TrialDirector application window behind other windows. When used with the [TOPMOST] and [MOVE] commands, third-party applications can have visual and positioning control of TrialDirector.

[IMAGE UPDATE(*Item ID*, *Path\Image List File*)]

Updates the document associated with the specified ItemID.

Path\Image List File is a fully qualified path\filename to a file that contains information on the item type and Path\Filenames for the image files. Valid item types are documents (indicated with a "1") and photographs (indicated with a "2").

An example of this information file for a three-page document would be:

"1"
E:\Images\Test0001.TIF
E:\Images\Test0002.TIF
E:\Images\Test0003.TIF

TrialDirector will delete this file after use.

[IMGFILE(*Path\Image File*, *Page Count*)]

This command should be sent to TrialDirector in response to TrialDirector sending a [GETDOCID] message.

Path\ImageFile is the path\filename to the requested image.

Page Count is the number or images for the requested document.

The typical sequence of commands is:

Command	Description
[SHOWIMAGE]	Host database application sends TrialDirector a command to show the requested image. The image is displayed if TrialDirector finds it in the

	current case. If not, the image information is requested from the host database application.
[GETDOCID]	TrialDirector requests the image information.
[IMGFILE]	Host database application responds with the image information. TrialDirector adds the image to the case so that it can be displayed.

[MINIMIZE]

Minimizes the TrialDirector application window to the task bar.

[PRINTBATCH(*BatchFileName*)]

Prints the images listed in the specified print list file.

BatchFileName is the filename (including extension) of the print list file you want to print.

[RESTORE]

When TrialDirector is minimized or maximized, this command restores it to a visible and resizable window.

[SETCASE(*CaseName*)]

Opens the specified case. If the case does not exist, TrialDirector creates it.

CaseName is the long name for the case (e.g., TrialDirector Demonstration Case).

[SHOWIMAGE(*Item ID*)]

Displays the item associated with the specified Item ID.

Note: *For clipboard communications, TrialDirector will search the first three words pasted on the clipboard for a match to a known Item ID. If a match is found, TrialDirector displays the item.*

Example:

The following text pasted to the clipboard causes TrialDirector to display the item "DOC001":

THIS IS DOC001 IN THE DATABASE

The following text pasted to the clipboard causes TrialDirector to display the Document for "DOC001" Page 2.

DOCUMENT DOC001/2

[TOPMOST]

Puts TrialDirector on top of all other application windows on the screen.

More Information:

- Appendices

Appendix C - Custom Footer Commands

Document Manager allows you to customize the footers printed across the bottom of images.

There are four possible section designations in the footer:

Command	Function
LEFT=	Left justifies the text following the command.
CENTER=	Centers the text following the command.
RIGHT=	Right justifies the text following the command. This command is overridden by the BARCODE command.
BARCODE=	Prints a right justified barcode. This command overrides the RIGHT command.

Each of these commands must be upper case.

The section commands can be used in any combination. However, the RIGHT= and BARCODE= command should not be used together because the BARCODE= command will override the RIGHT= command.

If none of the section commands are used, the footer text will default to left justified. However, if any of the commands are used, any text not designated to a section will not be printed. For example:

<LEFT=Smith v. West><CENTER=12/28/99><RIGHT=Confidential>

The following variables can be used in the footer:

Variable	Function
%D%	Prints the Document ID for the image
%P%	Prints the Item ID for the image
%N%	Prints the Page Number for the image
%T%	Prints the Trial Exhibit Number for the image
%E%	Prints the Exhibit Number for the image
%DESC%	Prints the Description for the image
%RECNO%	Prints the Universal Record Number

The BARCODE= command must be followed by the Document ID variable or the Item ID variable to specify what the printed barcode will represent, for example:

<LEFT=Doc ID: %D%><CENTER=Page %N%><BARCODE=%P%>

The following font values allow you to customize the font:

Font Value	Function
/BOLD	Prints the text following the command in bold letters. The default is off.
/FONT[*font name*]	Sets the font face for the text following the command. The default is Arial.
/SIZE[*font size*]	Sets the font size for the text following the command. The default is 10.

Each of these commands must be upper case.

If none of the font values are specified, the default values are used, for example:

<LEFT=/FONT[Script] /SIZE[14] /BOLD Item ID: %P%>

The font values have no effect with the BARCODE= command.

More Information:

- Appendices

Appendix D - TrialDirector Supported File Formats

File Extension	Description
Image Formats	
.TIF	Tagged Image File Format
.BMP	Windows Bitmap
.JPG	Joint Picture Experts Group (JPEG)
.GIF	CompuServe Graphics Interchange
.PCX	Zsoft Paintbrush
.FPX	Kodak FlashPix
.PCD	Kodak Photo CD
.PCT	Macintosh Bitmap PICT
.PNG	Portable Network Graphics
.TGA	Truvision Targa
.WPG	WordPerfect Bitmap
.DIB	Device Independent Bitmap
.EPS	Encapsulated Post Script (Embedded TIF Image)
.CUT	Halo Cut
.MSP	Microsoft Paint
.PSD	Adobe Photoshop
.ICO	Icon File
.WMF	Windows Meta File
Multimedia Formats	
.MPG	Motion Picture Experts Group (MPEG-1)
.M2P/.MPG	Motion Picture Experts Group (MPEG-2)
.MPEG	Motion Picture Experts Group (MPEG-1)
.MP4	Motion Picture Experts Group (MPEG-4)
.MPA	MPEG Elementary Audio Stream
.M1V	MPEG Elementary Audio Stream
.MP3	MPEG Audio Layer-3
.MP2	MPEG Audio Layer-2

.AVI	Audio Video Interleave
.WMA	Microsoft Windows Media Audio ¤
.WMV	Microsoft Windows Media Video ¤
.ASF	Microsoft Advanced Streaming Format
.WAV	Windows Waveform Sound
.MOV	Apple Quicktime
.QT	Apple Quicktime
.AIF	Macintosh AIFF Resource
.AIFC	Macintosh AIFF Resource
.AIFF	Macintosh AIFF Resource
.IVF	Intel Indeo Video File
.MID	Musical Instrument Digital Interface (MIDI)
.RMI	Musical Instrument Digital Interface (MIDI)
.AU	Unix Audio
.SND	Sound File (Sun, NeXt, Silicon Graphics)
Native (OLE) File Formats	
.PPT	Microsoft PowerPoint Presentation ¤
.DOC	Microsoft Word Document ¤
.XLS	Microsoft Excel Spreadsheet ¤
.PDF	Adobe Portable Document format ¤
.HTM	Internet Explorer Web page
.HTML	Internet Explorer Web page
.TXT	ASCII Text Transcript
.ASC	ASCII Text Transcript
.V1	ASCII Text Transcript
.AMI	Amicus Text Transcript
.CO	Cult 3D Object
.SWF	Macromedia Flash Movie ¤

¤ = Requires the appropriate Microsoft product or suite

- = WMV/WMA 8 Requires Media Player 7.1 or later
- = Support is built-in (Adobe Acrobat/Reader no longer required)
- = Requires Macromedia Flash Plug-in

More Information:

- Appendices
- System Requirements

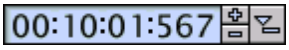
Appendix E - Multimedia Controls

Fast Forward

This button advances the multimedia stream. Click and hold to advance continuously.

Frame Position

The frame position indicates the current position of the multimedia stream format: HH:MM:SS:MMM (hours:minutes:seconds:milliseconds).



Frame Settings for Segment Start and End

When in the Edit/Record Mode, the frame settings define the beginning and ending positions of the current multimedia segment. To set the position, click the Stamp Segment Start/End buttons.

Increase/Decrease Segment Start and End

The plus (+) and minus (-) buttons adjust the segment start and end frame settings forward or backward one frame at a time. Click and hold to move quickly.

Pause

This button pauses the multimedia stream.

Play

This button begins multimedia stream playback from the current position.

Play 2x

This button plays the multimedia stream at twice normal speed.

Record

This button allows you to enter or exit Edit/Record Mode and display additional multimedia controls.

Rewind

This button to rewinds the multimedia stream. Click and hold to rewind continuously.

Seek to End

This button moves you to the end of the multimedia stream.

Seek to Start

This button moves you to the start of the multimedia stream.

Stamp Segment Start and End

This button sets the beginning or ending segment time to the current frame position.

Slider Bar

The slider bar indicates the current position of the multimedia stream. Use the mouse or light pen to slide the bar to another location in the multimedia stream.

Slow Motion

This button reduces the playback speed of the multimedia stream.

Status Indicator

The status indicator displays the current multimedia mode: play, pause, record or stop.

Stop

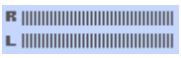
This button stops the multimedia stream.

Super Slow Motion

This button reduces the multimedia stream playback speed to less than regular slow motion.

Update Segment

While in Edit/Record Mode, this button allows you to save any changes to the segment start and segment end settings for the open segment.



Volume Controls

The volume controls increase or decrease the volume of the audio. Use a mouse or light pen to slide the control forward or backward.

More Information:

- Appendices
- Multimedia Manager
- Multimedia Control Box

Appendix F - Additional Commands and Keyboard Shortcuts

Below are several additional commands and keyboard shortcuts for use with Document Manager.

Keystroke	Command Description
CTRL + Left Arrow	Change Item Type tab to the left. Example, move from *Photos* tab back to *Docs* tab.
CTRL + Right Arrow	Change Item Type tab to the right. Example, move from *Docs* tab forward to *Photos* tab.
Tab	Shift focus around main Document Manager controls. Moves focus between Case Explorer, Item Type tabs and Image Viewer.
SHIFT + <Spacebar>	Tag / Untag current item in Document Manager Case Explorer
SHIFT + CTRL + S	Save Revision - Use after annotating image.
SHIFT + CTRL + R	Save as New Revision - Use after annotating image.
CTRL + INSERT	Add current Case Explorer item to current workbook. A workbook must be selected (highlighted).
*	Add current Case Explorer item to current workbook.

	A workbook must be selected (highlighted). Must use from 10-key pad.
SHIFT + DELETE	Delete selected annotation. The annotation tools and image viewer must both be active.
Up Arrow	Move to previous coding record. Use from column view. Must have focus in table grid.
Down Arrow	Move to next coding record. Use from column view. Must have focus in table grid.
Home	Move to first coding record in Form View.
End	Move to last coding record in Form View.
+	Zoom in on current image. Must use from 10-key pad.
-	Zoom out on current image. Must use from 10-key pad.
Up Arrow	Scroll up on zoomed image.
Down Arrow	Scroll down on zoomed image.
Left Arrow	Scroll left on zoomed image.
Right Arrow	Scroll right on zoomed image.
SHIFT + 5	Display full image. Must use 5 from numeric 10-key pad.
/	Rotate image 90 degrees clockwise. Must use from 10-key pad.
SHIFT + 5	Pause / Play multimedia stream when video window has focus from either *Clips* or *Media* tab. Must use from 10-key pad.

More Information:

- Appendices

Appendix G - Transcript Manager Clip Editing 10-Key Controls

Below is a table of the available clip editing keyboard controls using the 10-key pad. These clip editing controls are useful for those users with accessibility needs. The editing controls can be more efficient for users experienced with Non-Linear Editing (NLE) video systems. The table below list the keyboard combinations according to their appearance on a 10-key pad.

Note: *Make sure to have the Num Lock enabled.*

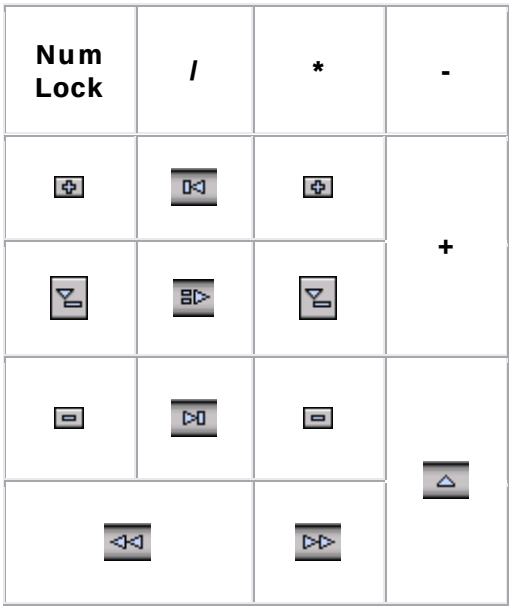
Control	Description
[Ctrl] + 7	Segment Start Frame Advance
[Ctrl] + 1	Segment Start Frame Backup
[Ctrl] + 4	Segment Start Set to Current Time
[Ctrl] + 9	Segment End Frame Advance
[Ctrl] + 3	Segment End Frame Backup
[Ctrl] + 6	Segment End Set to Current Time
[Ctrl] + 8	Seek to Beginning of Segment
[Ctrl] + 2	Seek to End of Segment
[Ctrl] + 5	Play / Pause Segment
[Ctrl] + 0	Back 1 Second
[Ctrl] + **[Delete]**	Advance 1 Second
[Ctrl] + **[Enter]**	Update Clip Segment
[Alt] + 0	Back 1 Frame
[Alt] + **[Delete]**	Advance 1 Frame

The layout below represents a typical 10-key pad. The clip editing controls are designed to have the segment start keys on the left column of numbers. The segment end keys are on the right column of numbers. The controlled video playback keys are on the bottom row. The segment seek keys are in the middle row of numbers, along with the play/pause control. The segment update uses the larger Enter key for ease of use.

<table>
<tr><td>Num Lock</td><td>/</td><td>*</td><td>-</td></tr>
<tr><td>7</td><td>8</td><td>9</td><td rowspan="2">+</td></tr>
<tr><td>4</td><td>5</td><td>6</td></tr>
<tr><td>1</td><td>2</td><td>3</td><td>Enter</td></tr>
</table>

0	**Del**	

The layout below represents a 10-key pad using the corresponding Transcript Manager VCR Control buttons.



More Information:

- Appendices

Appendix H - Case Security Privileges

Case Management

- Create a New Case
- Open a Case
- Copy Case
- Pack Case Database
- Repair Case Database
- Administer Case Privileges
- Remove Cases

Selection and Tagging

- Select/Clear All Tagged Item(s)

- Tag Selected Item(s)
- Select Item(s) from Batch File

Documents

- Add New Items
  - Manual Selection
  - Batch Import
  - Scan New Items
- Modify Items
  - Insert/Remove Document Breaks
  - Modify Primary (system) field data
  - Search and Replace in database
- Generate Case Load Files
- Create Subset Case from Batch File
- Create Quick-Text Exhibits
- Markup/Annotate Items
- Apply/Modify Labels
- Remove Items
- Remove Volume of Items

Memos

- Create/Modify Memos
- View Memos
- Remove Memos

Transcripts

- Import Transcripts From
- Export Transcripts To
- Index Transcripts
- Highlight Transcript Text
- Modify Transcript Properties
- Remove Selected Transcripts

Attached Exhibits

- Create New Exhibit from Selected Text
- Attach Synchronized Exhibit
- Remove Exhibit

Clips

- Create/ Modify Clips
- Execute Clip Creation Script (*.CCS)
- Export Clip Creation Script (*.CCS)
- Generate Excerpts from Clips

- Modify Clip Properties
- Remove Selected Clips

Multimedia

- Modify Multimedia Locations

Workbooks

- View Workbooks
- Create New Workbooks
- View Workbook Contents
- Add Items to Workbooks
- Remove Items From Workbooks
- Export Workbook Contents to Disc or Path
- Rename Workbook
- Remove Selected Workbook

Coding

- View Coding Data
- Import Coding Data
- Export Coding Data
- Modify Coding Data
- Synchronize Coding Items with Database
- Remove Coding Records
- Export Coding Data
- Modify Coding Data

Presentation Scripts

- Create Script from Folder
- Edit Script File

Presentation Mode

- Allow Login as New User
- Load Toolbar Layout
- Save Toolbar Layout
- Modify Toolbar Layout
- Modify Presentation Options

Accessibility

- Launch TimeCoder via Tools Menu
- Launch Presentation Mode via View Menu
- View Help Contents via Help Menu

Miscellaneous

- Print
- Options
- Modify Toolbar Layout
- Modify Presentation Options

Appendix I - Clip Naming Customization Commands

These commands are for use in the Options Menu in the Transcript Manager.

Custom clip identifier masks are applied when a new case is created. The mask is then maintained on a per-case level. Changing this mask and deploying an updated INI to client installs will allow an organization to set an 'initial' mask for all clients. Further management is done via the Transcript Manager Options dialog (on a per case basis).

Name Formatting

<FI> = First Initial (one Character)

<LI> = Last Initial (one Character)

Date Formatting

<D> = Unpadded Day (ex. 5 or 12)

<DD> = Padded Day (ex. 05 or 12)

<M> = Unpadded month (ex. 2 or 11)

<MM> = Padded Month (ex. 02 or 11)

<YY> = Short Year (ex. 97 or 03)

<YYYY> = Long Year (ex. 1997 or 2003)

Starting Page Formatting

<SP> = Unpadded start page (ex. 1 or 15 or 273) (same as <SP0> or <SP1>)

<SP1> = Padded to at least 1 digit (ex. 1 or 15 or 273)

<SP2> = Padded to at least 2 digits (ex. 01 or 15 or 273)

<SP3> = Padded to at least 3 digits (ex. 001 or 015 or 273)

(and so on, up through SP9)

<SP9> = Padded to at least 9 digits (ex. 000000001 or 000000015 or' 000000273)

Starting Line Number Formatting

<SL> = Unpadded start line (ex. 2 or 15) (same as <SL0> or <SL1>)

<SL1> = Padded to at least 1 digit (ex. 2 or 15)

<SL2> = Padded to at least 2 digits (ex. 02 or 15)

Volume Number Formatting

<V> = Unpadded Volume Number (ex. 1 or 24)

<VV> = Padded Volume Number (ex. 01 or 24)

Appendix J - Barcode Equipment

TrialDirector accepts a broad range of industry standard barcode equipment. When selecting your barcode reader, the following three items are necessary for proper function:

1. Ability to read "Code 128".
2. Ability to read "Code 3 of 9" (sometimes listed as "Code 3-9", "Code 3/9", or "Code 39").
3. Ability to issue an "add a Carriage Return Suffix" command.

We recommend the following as "nice to have" items:

1. Gun style instead of pen/wand style.
2. USB connection, instead of Serial (RS232) or PS2 wedge.

If you have questions or concerns regarding barcode equipment, please contact inData Technical Support.

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inData Corporation.
1325 North Fiesta Boulevard
Suite 4
Gilbert, Arizona 85233

Visit inData on-line: http://www.indatacorp.com